


Lancaster Arts Partnership

Economic Value of Arts Activity in the district of Lancaster

Economic Impact Study

Final Report

January 2011

Funded by:

Supported by:

Lancaster Arts Partnership

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Contents

Annexes

Executive Summary

Report purpose

This report has been prepared on behalf of the Lancaster Arts Partnership (LAP) by GENECON LLP, with assistance from market research company *Information by Design* (IbyD) and arts specialist *Helen Corkery Research and Marketing* to capture the scale and economic value of arts activity in the district of Lancaster.

A strong arts sector has developed in Lancaster district over the past thirty years, supported with contributions from the Arts Council, Lancaster City Council and Lancashire County Council. With uncertainty over the future of arts funding – both nationally and locally, this report has been prepared to provide an evidence base for arts funders faced with future decisions on support for arts activities in Lancaster, and to assist arts organisations within Lancaster to better understand the economic contribution that they make to the local, sub-regional and regional economies.

The approach taken in undertaking this economic impact assessment has been based on the principles of HM Treasury Green Book, and analyses the direct and indirect impact of both 'on' and 'off' site expenditure, in relation to the activities of the seven Arts Council England (ACE) supported Regularly Funded Organisations (RFO's) in Lancaster district, and an assessment of the overall economic value of arts activity across the district based upon a bottom-up understanding of the number of arts businesses and organisations operating across the district.

The analysis is segmented at four spatial levels (Lancaster District, rest of Lancashire, rest of North West, and outside North West) to provide a net economic impact value of the arts and estimates of employment, expenditure and Gross Value Added (GVA).

Arts activity in Lancaster

Formed in 2009, the LAP has brought together a consortium of arts organisations to work together to champion and promote the strategic development; to strive for excellence and innovation in arts activities and to establish a strong lobbying voice for the arts in Lancaster. Key members of the LAP include the seven ACE supported RFO's, with the table below providing a summary of their activities.

LAP RFO Partners		
		Summary description
The Dukes	***The Rake***	Traditional 'end-on' stage performance area with a 313 capacity with stadium style seating
	The Round	A new 240 seat theatre space which is circular, but can also be transformed into a horse shoe shape
	Cinema	An independent cinema which presents a selection of independent cinema and current releases
	DT3	A year-round arts participation programme for young people
	Williamson Park	A yearly outdoor promenade theatre production at Williamson Park
	Gallery	Open every day and has free entry, presents work from some of the region's top artistic talent
Ludus		A leading UK professional contemporary dance company
More Music		Runs workshops, professional training, community festivals, live music and a programme of classes
Litfest		Literature events for people to engage with contemporary literature and celebrate literary excellence
Storey Gallery		Nurtures, commissions, promotes, and presents innovative and challenging contemporary visual art
Lancaster University	***Nuffield Theatre***	One of the most important venues in the UK for experimental and contemporary performance
	Concert Series	Held in the University's Great Hall, it offers a programme of concerts, music and events to the public
	Peter Scott Gallery	Presents a varied programme of exhibitions, including the University's international art collection
folly		A leading digital arts organisation that presents an innovative programme of art projects

In addition to the seven RFOs, this report identifies that Lancaster district is home to a wealth of arts and cultural activities that cover many art-forms and provide opportunities to develop creative skills across all sectors of the population. A detailed mapping exercise has been undertaken (including an assessment of data available from the Standard Industrial Classification, Yellow Pages and Google). This has identified 602 businesses and organisations located in the district within the arts sector, employing between 1,200 and 2,100 people and contributing more than £50m to the sub-regional economy.

The Economic value of arts activity in Lancaster District - Key Findings

The economic value of the Lancaster arts partners is significant

- Direct and indirect (supply chain and secondary spend) activities of the seven LAP Partners generate some 200 net additional jobs, and an annual economic contribution of £7.5m;
- The majority of this economic contribution is captured within Lancaster district (c.80%); a further 5% in the rest of Lancashire; 7% throughout the rest of the North West region, and the remaining 8% outside the North West region;
- A further £800,000+ of marketing/promotion value is generated through media coverage of the activities of the Partners reported outside the district;
- As a partnership, the LAP offers good value for money in terms of economic return on investment for the core funders of ACE, Lancashire County Council and Lancaster City Council, delivering £5.19 in economic benefit for every £1 of core revenue investment (comparing well against national benchmarks, for example, PWC's 2009 findings - average GVA return for RDA business support projects of £2.80:1).

There are wider benefits from the activities of the Lancaster arts partners

- The organisations involved in the LAP provide a wide range of activities and events aimed at all people within Lancashire, regardless of age, race, ethnicity or gender. These broader impacts cultivate a strong community identity for the people of Lancaster and a recognisable brand to promote nationally and internationally. This is particularly in relation to local policy contribution, with their activities aligning with the LDLSP Sustainable Community Strategy.
- For example, it is estimated that the LAP partners' work provide more than 20,000 participations for young people annually, inspiring interest and fulfilling aspirations in new skills, across activities as varied contemporary dance, theatre, digital media, creative writing and poetry appreciation.

A significant cluster of arts based businesses and organisations has developed in Lancaster district over the past 30 years

A comprehensive analysis of the businesses and organisations across Lancaster District has shown that there are more than 600 businesses and organisations involved either directly or indirectly in the arts and cultural sector, which between them it is estimated account for:

- 1,200 - 2,100 gross jobs;
- 1,390 – 2,430 net additional jobs;
- £50m - £85m GVA per annum.

It is likely that further investigation would reveal more detail on this important cluster. Whatever a further survey might reveal however, there needs to be more recognition of the importance of the three main funders and the role that each have played in investing in the arts in Lancaster district over the past 30 years. This investment has provided support to many arts providers which has contributed directly to the creation of a skilled and creative supplier base. It is no coincidence that there are so many businesses and organisations in the arts sector within the local economy.

The new Arts Council policy may have an influence in funding decisions

ACE currently provides investment support to 850 RFOs across England. Within the region, ACENW currently provides investment to 106 RFOs, of which seven are located in Lancaster district:

- Lancaster district is the third largest recipient of funding support from ACENW behind the region's two major cities of Manchester and Liverpool, representing an above average concentration of support for a single district. This is recognition of the excellence and innovation in arts within the district, particularly in the fields of dance, digital media, visual arts and live performance;
- Lancashire County Council for its part also recognises the need for concentration of investment into one area so that capacity can be built for supporting delivery of arts activity on a county-wide basis. The presence of 600 arts businesses and organisations within Lancaster district endorses this strategy.
- However, across the whole of the county, Lancashire (including Blackburn with Darwen and Blackpool Unitary Authorities) only receives the equivalent of £1.08 of ACE funding per head of population, compared with a regional average of £3.47, and lags significantly behind those in Merseyside (£5.92 per head), Greater Manchester (£4.74 per head) and Cumbria (£4.00 per head).

The funding landscape has changed during the course of the study, with reduced budgets and funding available to arts and cultural organisations. A new set of criteria is to be applied to future funding decisions and by the end of the process, a portfolio of organisations will be supported and shaped by the Arts Council's 10-year strategic framework. This will provide a balance of large and small organisations, across all art forms and geographical areas, and with either, an outstanding track record of achievement or outstanding potential.

This shift in the ACE approach presents a real opportunity for further investment in Lancaster's cultural economy. Following the new allocations of funding it is hoped that further recognition of the work of the LAP will encourage continued support from other funders.

Arts events and activities are important to Lancaster, residents & visitors

Arts events attract people to and from outside the district, with 85% of attenders at arts events stating in surveys that it was the event itself which was the main reason for their visit. Other key survey findings from the study include:

- More than 80% of attenders agreed or agreed strongly that the arts are *'a very important part of my quality of life'*;
- 71% thought that the arts *'enhance the quality of life in Lancaster District'; and*
- just under 50% thought that '*the range of arts activities in Lancaster District differentiates it as a place to live'.*

Key Opportunities

In terms of the future, this report has identified that there exists some real opportunities to further develop *the economic value of the arts in Lancaster district.*

Lancaster's arts based businesses are a talent pool which could be more widely promoted beyond the district

- The study has identified 602 local businesses and organisations actively involved in the arts in the district. Potentially, these provide a talent pool in Lancaster district which could better serve the wider sub-regional and regional economy if their work were to be actively promoted outside the area. Both the county and the district councils have a potentially important role here.

The local hospitality trade should work with arts providers to encourage a "beds for bookers scheme"

- Although the bookers' post codes show that some people could have been overnight stayers, it was somewhat disappointing that the audience survey work suggests that many of these tend to travel back home after the event, or those who do stay, tend to stay with friends and family. There was also not too much evidence of promotional activity between tourist / accommodation operators (some limited evidence of linked deals with restaurants) and arts providers, revealing that there is a significant opportunity for further economic benefit from the arts if these activities were better joined up, perhaps facilitated by the LAP Partners working with the City Council's tourism team. For example – a "sell beds to bookers" initiative.

More local events and festivals through involving arts providers

- A further opportunity lies in the fact that arts providers in the district could be an important resource for the city council's new initiative for more events and festivals. The arts partners have a reach beyond the immediate local area which could be developed in partnership with the city council (for example, 61% of the audience for the Dukes's Peter Pan shows in Williamson Park came from outside Lancaster district, 29% from outside Lancashire, and 5% from outside the North West region).

Live arts have as much to offer Lancaster's reputation for culture as its heritage

- Tourism research from L&BTB has shown that Lancaster has a strong association with culture, but it is usually the heritage aspect of culture which is brought to mind. The "living" arts aspect of culture has a much lower profile and given this is the case, there is a significant opportunity to promote Lancaster district as a destination for all 3 aspects of culture - heritage, arts and landscape. A further benefit of including the arts in Lancaster's culture offer is that arts activity is spread across the whole district.

1 Introduction

1.1 Purpose of document

This report has been prepared for the Lancaster Arts Partnership (LAP) by GENECON LLP, with assistance from Information by Design (IbyD) and Helen Corkery Research and Marketing to capture the scale and economic value of arts activity in the district of Lancaster.

The scale of the arts sector across Lancaster district is significant, and this is reflected in the level of funding support received from Arts Council England (ACE), with Lancaster district receiving the third highest level of ACE funding in the North West, behind the region's two major cities of Manchester and Liverpool.

ACE funding support is usually reflective of excellence in arts activity and currently supports seven Regularly Funded Organisations (RFOs) across the district - The Dukes Theatre; Ludus Dance; More Music; Litfest; Storey Gallery; Lancaster Institute of Contemporary Art (LICA) at Lancaster University, and folly.

The main objectives of the study's original brief included:

- to identify the economic value of the arts activity of these seven RFO partners to the Lancaster City Council district; Lancashire County and to the North West region;
- estimate the value of arts activity generally as presented in Lancaster district;
- evaluate the connectivity or cluster effect of the arts providers in Lancaster;
- identify the economic value of the revenue funding investment in the arts made by local authorities as well as the indirect economic value through the art's enabling contribution to Lancaster Districts broader economic objectives;
- assess the potential for, and the case that could be made for increased investment of the arts in Lancaster; and,
- for one project only (the Dukes Theatre), to evaluate the effect of the NWDA's capital investment in 2008.

This report has been prepared at a time when there is a good deal of uncertainty created by the impact of the Government's Comprehensive Spending Review and the announced budget and funding cuts to Government funded organisations, the local authorities and the closure of Regional Development Agencies by March 2012.

Given the context of the current reductions to arts funding and the future restraint on public expenditure in non-statutory areas such as the arts, this study sets out to assess the value of Lancaster's arts activity to the local economy and to make the case for continued support for the Arts Partners' activities to help ensure that their current offer is sustained into the future.

1.2 The development of the Arts in Lancaster and the Lancaster Arts Partnership

The local authority district of Lancaster – with its population centres in the historic city of Lancaster, the seaside resort of Morecambe, Carnforth and Heysham and the many smaller villages clustered around and in the rural areas of the lower Lune Valley has a long-standing tradition of arts activity. The portfolio of artists and arts organisations include several groups that were first founded in the 1970s, and today offer national and internationally recognised music, dance, theatre and visual arts activities. There are 10 performance venues and 20 art galleries across Lancaster District. The city centre in

Lancaster, the University campus and the central promenade area of Morecambe are all hosts to arts activities and festivals during the year, drawing on a pool of local talent in performing and visual art in a district where the arts have been supported by three public sector partners - the Arts Council, Lancashire County and Lancaster City Council - working together and offering core funding since the 1980s.

This has given the district a leading role in the cultural infrastructure of the North West region, as recognised by the level of support Lancaster receives from ACE. In addition, however, the 7 RFOs continue to receive additional public sector support from Lancaster City Council and Lancashire County Council.

Formed in 2009, the Lancaster Arts Partnership has brought together a consortium of companies working together to champion and promote the strategic development of excellent arts activities in Lancaster District. There are 8 'Partner' companies (including all 7 RFOs) which are bound into the partnership by a Memorandum of Understanding, and there are 3 'Associate' companies.

The consortium's work is wide-ranging and is developing quickly, and it aims to work with other arts and non-arts organisations in order to:

- offer a strategic vision for the arts in Lancaster district;
- increase the profile and importance of arts in the district of Lancaster, regionally, nationally and internationally;
- initiate partnership, cross-art and cross-sectoral work that creates new opportunities; and
- expand the collective knowledge-base and effectiveness of the arts sector.

1.3 Approach to the economic assessment

The approach taken by this economic impact assessment has been to analyse the monetary impact of both 'on' and 'off' site expenditure associated with the activities of the seven RFO LAP partners and to place this in the context of an assessment of the overall economic value of arts activity across the district based upon a bottom-up understanding of the number of arts organisations operating across the district.

The methodology has involved a mix of desk-based analysis (secondary data, policy context); consultation (with the Lancaster Arts Partners and other key stakeholders); primary research (surveys with audiences/participants) and direct, indirect and supply chain assessment (based on information/data supplied by the Arts Partners. This analysis has gathered data at three spatial levels (Lancaster, rest of Lancashire and rest of the Northwest region), and has enabled an economic input-output model to be developed.

1.4 Report structure

The report is arranged as follows:

- Section 2 - provides a review of the current policy context;
- Section 3 – sets out a background profile, activities and assets of arts in Lancaster;
- Section 4 - identifies the activities of the RFO Lancaster Arts Partners;
- Section 5 – presents and analyses the key findings of the primary research;
- Section 6 – economic value and return on investment analysis; and,
- Section 7 – key findings.

2 Policy overview

2.1 Introduction

The recent UK recession has highlighted the need to safeguard and create new economic opportunities within local economies. The current uncertainty over the UK's economic prospects and the potentially disproportionate impact of public spending cuts on local authorities and the North West region present additional challenges. It is clear that the next three to four years will be especially difficult.

This section considers previous and emerging policy that provides the context for arts activities. With the election of the coalition government, this context is changing rapidly and will need to be frequently reviewed.

2.2 National policy context

Overall, national policy for the arts and cultural sector is led by the Department for Culture, Olympics, Media and Sport (previously the Department for Culture, Media and Sport). As yet, following the election of the new Government in May 2010, it still remains unclear as to the future strategic drivers for arts activity. However, it is likely that the focus will continue to be improving the quality of life for all through cultural and sporting activities; to support the pursuit of excellence and to champion the tourism, creative and leisure industries.

Over the last few years, the aim of the DCMS has been focused on maximising the contribution that the arts sector makes to four strategic priorities: 1) Children and Young People; 2) Communities; 3) the Economy; and 4) Delivery. Specific aims include:

- broadening access for all to a rich and varied artistic and cultural life;
- ensuring that the artistic activity funded aspires to be world class;
- ensure that everyone has the opportunity to develop artistic talent and to achieve excellence in the arts;
- develop the educational potential of all the nation's artistic and cultural resources;
- raise standards of artistic and cultural education and training;
- ensure an adequate skills supply for the arts and cultural sectors; and,
- reduce the number of those who feel excluded from society, by using the arts.

The intended objectives for the 2008-2011 period has included:

- *Opportunity*: encouraging more widespread enjoyment of culture, media and sport;
- *Excellence*: supporting talent and excellence in culture, media and sport;
- *Economic impact*: realising the economic benefits of these key sectors; and,
- *Olympics*: to deliver a successful and inspirational Olympic and Paralympic Games with a sustainable legacy.

In February 2008, the DCMS, in partnership with BERR and DIUS, published *'Creative Britain: New Talents for a New Economy'*. This strategy document has identified 26 commitments through which the Government would take action to support the creative industries, given recognition that these are seen as offering growth potential, both nationally and regionally.

Most of the support for the arts and cultural industries has been channeled through the government funded organisation, Arts Council England (ACE). ACE works *"to get great art to everyone by championing, developing and investing in artistic experiences that enrich people's lives"*. ACE's key objectives include:

- **Excellence –** high quality arts and high quality arts experience;
- **Reach –** more people attending and taking part in the arts;
- **Engagement –** more people feel that there are opportunities to enjoy and get actively involved in arts activities;
- **Diversity –** arts that reflect the diversity of contemporary England; and,
- **Innovation –** artists have the freedom and are challenged to innovate.

The following provides a review of the two key ACE policy drivers for arts activities prior to May 2010, the emerging impact on arts activities that have stemmed from the change in Government and a review of the recently produced 10-year strategic framework for the arts and a new national portfolio funding programme.

2.2.1 Arts Council England (2010) 'Cultural Capital: A Manifesto for the Future – Investing in Culture will build Britain's Social and Economic Recovery'

ACE produced a manifesto in April 2010 that focused on presenting a joined-up approach to investment in cultural industries, as a means of supporting social and economic recovery. The manifesto highlights the importance of the cultural sector in contributing to an up-turn in the economy, identifying that *'culture is the catalyst for change'.*

The manifesto suggests that in the current economic climate, arts and heritage are particularly important to people and communities as they are vital to the quality of life of much of the population, enjoyed by two-thirds of the adult population. The importance of investment in the arts is highlighted in the manifesto, stating that *'arts and heritage helps to generate capital that feeds the creative industries with knowledge, practical experience and inspiration'.*

2.2.2 Coalition Government (Post-May 2010)

With the new Government's focus on deficit reduction across all parts of the public sector, the DCMS (COMS) were initially required to make £88m of savings as part of the planned £6.2 billion public spending cuts for 2010/11, with the ACE budget expected to be cut by £5m.

There still remains uncertainty over the future of arts and culture strategy, but at a keynote speech given in May by Culture Secretary Jeremy Hunt, a number of key principles were set out in terms of the Government's approach:

- to support a mixed economy that encourages and promotes philanthropy and sponsorship;
- culture and arts to be available and accessible for everyone, with continued support for free access to museums and galleries and educational programmes;
- support for the arms length principle, with ACE continuing to be responsible for grant decisions;
- cultural policy to continue to take a front seat in economic, education and regeneration policy-making.

As part of the keynote speech, the Culture Secretary also made a number of assurances with regards to the current spending environment. Of particular note were:

- recognition of the important role of arts and culture in contributing economic value; value to society and individuals, and value as a nurturing ground for creative industries;
- given the tough public spending environment, this will inevitably impact on the arts and cultural sector. However, this will not be singled out as a soft target;
- to seek to secure core budget savings within DCMS, with ACE requested to cut their administration costs to 5% of budgets dispensed;
- cuts in overspending, administration and bureaucracy will be targeted ahead of decisions that could affect creative output;
- to reward high performance organisations by moving towards longer-term funding arrangements, and to strengthen fundraising capacity across the sector; and,
- arts, heritage and grass roots sport to be restored to their original 20% share of National Lottery good cause funding i.e. £50m each year for the arts.

Within this context, there are a number of issues for arts organisations moving forward. It is clear that arts organisations will need to increase their capacity to secure opportunities for mixed-funding arrangements that can demonstrate economic, social and educational value. It will be essential for arts organisations to achieve high performance (artistic and operational) and to demonstrate efficient administration and governance.

More recently the Government's Comprehensive Spending Review (October, 2010) announced that DCMS will have its annual budget cut from £1.9 billion to £1.1 billion, with the ACE budget cut by almost 30% - with 40% of these savings expected in administrative costs (abolishing/merging quangos etc) as a means of offering some level of protection to frontline arts delivery.

2.2.3 Arts Council England (2010) Achieving Great Art for Everyone: A Strategic Framework for the Arts and the National Portfolio Funding Programme

ACE has recently produced (November 2010) a 10-year strategic framework. This builds upon the 2008-2011 strategy and funding framework 'Great Art for Everyone', and sets out the rationale for ACE's continued investment in the arts and to inform its future funding decisions alongside the introduction of a new funding system from April 2012 that will replace the current RFO system.

The strategic framework has been developed from a wide ranging consultation process.

The outcome is the move to a more flexible and focused system of funding around five long term goals which now sit at the heart of the framework. These include:

- **Goal 1: Talent and artistic excellence are thriving and celebrated** – England is regarded as a pre-eminent centre for artistic excellence;
- **Goal 2: More people experience and are inspired by arts** – the arts is at the centre of people's lives – more people are involved in arts in their communities and are enriched and inspired by arts experiences;
- **Goal 3**: **The arts are sustainable, resilient and innovative** – collaborative and networked, the arts are known for resilience, innovation and their contribution to the nation's reputation and prosperity;
- **Goal 4**: **The arts leadership and workforce are diverse and highly skilled** – the delivery of the arts workforce reflects the diversity of society and artistic practice in

England. Outstanding arts leaders play a wider role in their communities and nationally; and,

- **Goal 5: Every child and young person has the opportunity to experience the richness of the arts –** children and young people have the best current and future artistic lives they can have. They are able to develop their artistic capabilities and engage with, and shape, the arts.

The report states that in the future, the ACE vision is *'of England as a world-leading creative and cultural nation'*, with the aim to *'promote the conditions in which the most talented artists can be their best, take risks and change direction'*, highlighting that their investment will *'favour art that is both artistically excellent and inspiring to audiences'.*

Central to the strategic framework is a new way of funding organisations. From April 2012, a new system will replace the current RFO system, signalling the most significant transformation to arts funding for a generation. The new system will allow all arts organisations, including RFOs to apply for support, although the new portfolio of supported projects is anticipated to be reduced from the current one. There are four major changes from the existing RFO system:

1. an open-application process for all organisations;
2. funds awarded will be for a fixed term of normally three years, but there will be the flexibility to have variable funding terms of as little as two years or as much as six years;
3. the funding agreement with individual organisations will be tailor-made, based on the delivery of shared goals and clear criteria; and,
4. the funding agreements will be based around 'strategic' and 'programme' relationships with organisations, rather than a 'one-size-fits-all' relationship.

Lottery monies will continue to be used alongside for some limited investment in capital projects for strategic opportunities, and for Grants for the Arts – the open-application Lottery scheme that is focused on funding artists and developing talent. Grants for the Arts will have more money made available for new and innovative projects.

This new approach envisages two types of relationships with ACE, in terms of working with a small number of 'strategic' organisations considered to be the backbone of arts in England, who are expected to demonstrate excellence and leadership at a national or local level, and a larger number of 'programme' organisations/individuals funded on the basis of their programmes of work, in terms of delivering outstanding artistic work in their field.

It is envisaged that these changes will result in more flexible, more open and more transparent decision-making with all funding decisions made against a set of clear criteria, with organisations required to demonstrate how they will help to meet at least two of the five goals set out in *Achieving Great Art for Everyone*. The closing date for applications is 24th January 2011, after which time the applications will be assessed and organisations informed of future funding allocations by the end of March 2011.

Given the current climate, funding decisions will have to be made in the context of more limited resources whilst still providing the conditions for excellence to thrive - not all organisations will be successful; some may receive more support, whilst others will receive less. Existing RFOs that are unsuccessful will be given at least a year's notice of any significant changes to their funding.

By the end of the process, a portfolio of organisations will be supported shaped by the 10-year strategic framework, with a balance of large and small organisations, across all art forms and geographical areas, and with either an outstanding track record of achievement or outstanding potential.

2.3 Regional policy context

Following the Government's decision to abolish regional development agencies by April 2012, and plans to replace the RDAs with Local Economic Partnerships (LEPs), the landscape remains uncertain as to future regional/local strategic direction. Currently, given the changing circumstances, the Northwest Development Agency is working with partners in the region to manage the transition of its responsibilities. As a consequence, this has weakened the key regional strategies which are briefly reviewed below.

2.3.1 NWDA (2006) 'Regional Economic Strategy' (RES)

The vision for the North West is to create *'a sustainable international economy which competes on the basis of knowledge, advanced technology and an excellent quality of life'*.

As part of this vision, the RES identifies three major drivers, including providing the 'conditions for sustainable growth'. As part of this, a key theme is focused on improving 'quality of life' through:

- Developing culture and image
  - RES Action 95 – promote the image of the region – develop and implement marketing programmes to promote a positive image of the region;
  - RES Action 98 – secure cultural events for the region;
  - RES Action 103 – implement a Business Tourism Strategy, to develop the quality and range of facilities within the region;
  - RES Action 104 – Develop and implement a Visitor Information Strategy for the region.
- Improving the environment, including the quality of the visitor experience
  - RES Action 115 – Deliver sustainable growth through use of the region's heritage assets, especially its cities, including Lancaster.

The RES also identifies Lancaster as providing significant economic potential as one of the region's 'significant growth opportunities'. Morecambe is also designated as a 'Priority Regeneration Area'.

2.3.2 NWDA (2007 revision) 'The Strategy for Tourism in England's North West 2003-2010'

The regional tourism strategy updates the 2003 Tourism Strategy for the North West, which seeks to support tourism and business within the sector. The revised strategy is designed to:

- Strengthen the region's focus on offering some of the best visitor destinations in the UK;
- Connect with the growing importance being attached to the role of local authorities in place-shaping;
- Ensure that work is aligned with both the new national thinking on tourism, and with the RES; and,
- To give centre stage to the principles of sustainable development.

The vision as set in the revised strategy is that within ten years the North West, '*offers visitors real excellence and superb experiences, wherever they go, and has a thriving visitor economy that is second to none*'.

The strategy seeks to provide real excellence in services, including delivering a region-wide programme of events and festivals that celebrate the region's historical, cultural and environmental diversity. The Tourism Strategy also seeks to generate *'economic and social benefits for our communities and for the region as a whole by adding value in all that [the NWDA] do'.*

The delivery agencies for the regional tourism strategy have been the five regional tourist boards. These bodies are funded via the NWDA so their future is uncertain as their funding contracts expire in March 2012.

2.4 Local policy context

The following provides a summary of the current local policy context, however, with plans for Local Economic Partnerships (LEPs), the future Localism Bill and given the impending demise of the NWDA, it is likely that a new strategic approach will emerge that may see policy delegated down to a local level.

Both Lancaster City Council and Lancashire County Council have a pivotal role to play as funding bodies (especially given that arts and culture are non-statutory obligations for local authorities)[1] and as custodians of cultural buildings, venues and spaces. Between the two organisations they are responsible for a range of public services that impact upon the creative vitality of the district, from museums and parks to schools and community groups. Although the Arts Strategy for Lancaster has not been adopted, both City and County Councils have recently included 'culture' in their corporate priorities for the first time, highlighting the increasing importance of such activity to Lancaster and Lancashire.

Key existing local policies are as follows:

2.4.1 Lancashire Economic Partnership (2007) 'Economic Strategy and Action Plan'

This strategy sets out the vision for the Lancashire sub-region, and has been adopted to provide a coherent framework for the delivery of the North West RES in Lancashire. The strategy sets out an approach for the development of the sub-regional economy including building on the culture, heritage and environmental quality of the sub-region. In addition, spatial priorities have also been developed that encompass both Lancaster and Morecambe.

The county is towards the end of its second Local Area Agreement (LAA) which is an agreement between Lancashire County Council and its partners and central government about how priorities for Lancashire will be measured and about how much improvement will be made over the next 3 years from 2008 to 2011. Generated by the Lancashire Partnership's sustainable community strategy which identifies Lancashire's challenges and ambitions and sets out the strategic vision for the county, there are seven themes for the LAA, namely:

- People and Communities
- Community safety
- Children and Young People
- Health and Wellbeing

[1] It is understood that Lancaster City Council has developed a strategy for arts in the district – 'A Creative Landscape – Arts Strategy for Lancaster' (2009), however, this strategy has not been adopted.

- Older People
- Economic Development
- Environment.

2.4.2 Lancashire County Council (2010) 'Economic Strategy 2010 – Framework of Priorities

The Council's latest economic strategy was produced in March 2010, and sets out a series of priorities for the County, aimed at improving the economic performance of Lancashire. The Strategy aims to stimulate dialogue on the refinement of shared priorities for action with public and private sector leaders within the sub-region. The three year strategy was produced to provide an overarching framework to direct economic development issues, and is supported by targeted action plans to guide and drive forward the Council's activities on the ground. The framework is structured around 5 strategic priorities:

1. Economic Growth, Knowledge and Innovation;
2. Spatial;
3. Skills and Employment;
4. Infrastructure; and
5. Partnership Development.

The Lancaster Arts Partners activities contribute to most of these priorities, and in particular have a key role in the economic growth of the district.

2.4.3 Lancashire County Council (2010) 'The culture and sport strategy for Lancashire County Council 2010-2014

Lancashire County Council has been at the forefront of a significant number of cultural initiatives, working in partnership with a wide range of agencies and communities. The Council produced a culture and sports strategy in 2010 to ensure culture related activities in Lancashire contributed to achieving positive outcomes for the people in the county. The strategy highlights the importance of culture (which includes the performing and visual arts) and sport and the role they play in contributing the quality of life in the county. The vision is that: Lancashire will be a place which values, demonstrates and highlights the key role that culture and sport play within the economy.

The strategy seeks to ensure that increasing numbers of people live happy with fulfilled lives in secure employment with opportunities for active, healthy and enjoyable leisure pursuits. In particular, this includes:

- Developing increased opportunities for participation;
- Nurturing growth of cultural and sport related industries;
- Promoting creative learning in formal and informal settings;
- Providing information and training opportunities; and,
- Sustaining and conversing what is valued.

The strategy and its aims seek to create a higher profile within the county council for culture and sport, and making the most of its existing resources by allowing for economies of scale, joint working and putting together initiatives with more weight.

2.4.4 Lancaster City Council (2008) 'Core Strategy 2003-2021'

The Core Strategy is a key part of the Local Development Framework. This Strategy outlines the vision for Lancaster district as a sustainable district whose quality of life and standards of development lead the region. The strategy recognises the importance of Lancaster as *'a prosperous historic City with a thriving knowledge economy'* and sets out policies to regenerate the local economy, including supporting the potential for visitors and tourism activity (Policy ER6).

It recognises that the district has many attractions, including its arts and cultural offer, some of which are currently under-utilised. The focus is therefore about improving and supporting existing cultural facilities in order to create a better cultural / tourism offer in the district.

It is planned that the Core Strategy will be supplemented by a range of detailed plans and strategies for priority areas which, together will make up the Council's Local Development Framework.

2.4.5 Lancaster and Morecambe Vision Board

The Lancaster and Morecambe Vision Board produced a vision statement for Lancaster District, that seeks to improve linkages between those most in need in the district and creating clear economic opportunities. In order to achieve the vision for the area, four key drivers for Lancashire have been identified:

- Higher value activity and investment;
- Investing in people;
- Employment generation and entrepreneurship; and,
- Investment in quality of place.

This vision highlights the importance of *'creating the conditions for growth'*, and recognises the importance of improving the quality of place offer in cities, towns, rural and coastal areas. It is clear that the arts and cultural offer in Lancaster aligns with this vision in contributing to the district economy, and creating a 'high quality place' for residents and visitors alike.

2.4.6 Lancaster District Local Strategic Partnership (2008) 'Sustainable Community Strategy 2008-2011'

The Lancaster District Local Strategic Partnership (LDLSP) was formed in 2001 as a non-statutory partnership comprising representatives from the public, private, voluntary and community sectors, and was tasked with tackling social, economic and environmental issues in a sustainable way.

In 2008, LDLSP refreshed the *'Sustainable Community Strategy'*. This sets out local priorities and objectives over a three year period, with focus on partnership working at the heart of the strategy and achieving a high quality of life for local people.

This strategy identifies 21 'local' priorities which the LDLSP will concentrate on up to 2011. These priorities have been grouped into seven themes, with each thematic group being allocated one of more of these local priorities.

The arts and cultural activities and organisations within the district are particularly relevant in terms of supporting the LDLSP's priorities with regards to:

- ***Theme 1: Children and Young People***

- Priority 1: Increase the life chances, opportunities and outcomes for children and young people, allowing them to play a full and active part in the life of Lancaster district;
- Priority 2: Increase the number of parents that receive guidance and support in the district.

- ***Theme 2: Economy***
  - Priority 1: Increase economic opportunity in the whole district, facilitate access to our natural and built environment and implement an integrated transport solution to bring the major urban centres in the district together.
- ***Theme 3: Education, Skills and Opportunities***
  - Priority 1: Increase the provision and opportunities for all people to self develop;
  - Priority 2: Engage NEETS (Not in Education, Employment or Training) young people and those who are workless on a long term basis in developing work related and life skills.
- ***Theme 7: Valuing People***
  - Priority 1: Improve community cohesion, a sense of belonging and taking part by promoting positive relationships between the diverse and emerging communities and groups in the Lancaster district;
  - Priority 2: Increase the capacity of the voluntary, community and faith sector in order to strengthen community engagement and enable the sector to act as advocates for and service providers to our local communities.

The LDLSP is committed to ensuring that projects and activities align with these principles. All local priorities within the strategy link to each other, and are cross-cutting, therefore the LDLSP aims to ensure that all groups involved in delivering projects work alongside each other, communicate effectively and support each other for maximum impact.

These themes are returned to later in the presentation of the wider impacts of each of the LAP partners.

2.4.7 Lancaster City Council (2010) 'Cultural Heritage Study'

Following discussion with Lancaster City Council, it is understood that a *'Cultural Heritage Study'* is currently under preparation by BlueSail and SQW. It is being prepared with an action plan to help focus investment priorities.

We have been informed that the findings of this study will be made publicly available by the end of the year.

2.5 Policy summary

There is at the current time a good deal of uncertainty over the future of public sector strategy and support for the art and cultural sector.

Within the current context, with reductions to arts funding, the introduction of a new funding programme to replace the RFO system and the future restraint on public expenditure for non-statutory areas such as art and culture, it is clear that the future for arts and cultural organisations remains uncertain.

Nevertheless, there remains a commitment to and recognition of the important role played by arts and culture in terms of its economic, social and educational value. As such, there

remains on-going support for arts and culture within the context of the more limited resources available.

The new ACE Funding Programme will ensure support for a balance of large and small organisations, across all art forms and geographical areas in order to retain a strong and resilient future for the arts and cultural sectors.

2.6 Policy Implications

While there is policy support for the arts at City Council and County Council level, this is based on history and to date has lacked an evidence base. This report has been commissioned to provide this evidence base in anticipation of new pressures to reduce funding support.

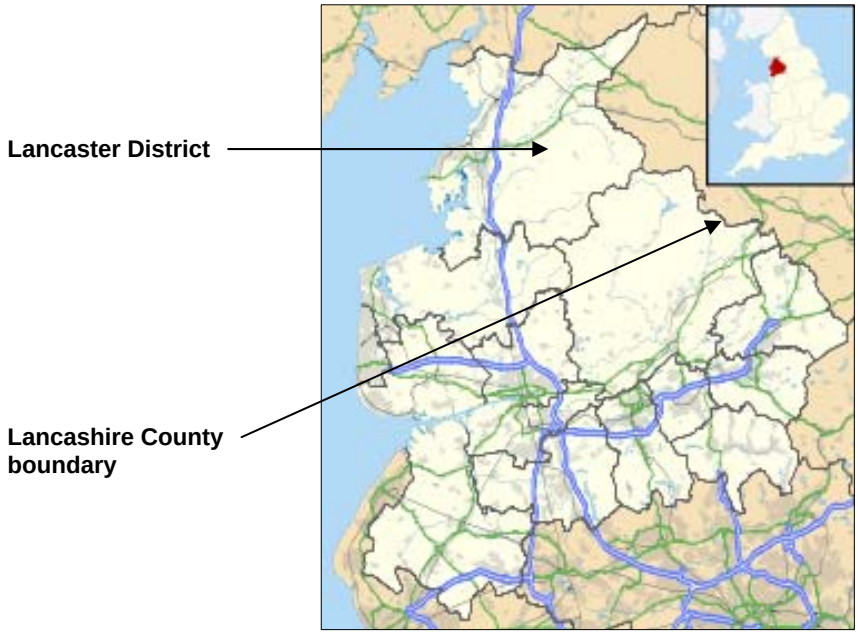
The evidence required from those bidding for ACE funding from 2011 onwards will be taken from the artistic plans of the organisations concerned. In Lancaster District, these plans have always been based upon an assumption of core funding support from all 3 main funders for the artistic aspirations required by ACE to be viable. These arrangements are often referred to as "tri-partite" agreements. These agreements go back 30 years for some of the organisations concerned and, generally have been critical for delivering both artistic output alongside the economic, social and education delivery expected by the local authority funding partners.

An important element in this 30 year tri-partite investment by the three main funders of the arts in Lancaster District (ACE, County Council and City Council) is the fact that a large part of the investment has been core funding, as opposed to project funding. Core funding is essential to arts organisations in allowing them to develop programming over a long time frame and to set annual operating budgets because, in general, it is committed well in advance.

3 Arts and culture in Lancaster district

3.1 Local context

The district of Lancaster is located in the North West region, and is the most northerly district in the county of Lancashire. The district provides a blend of city, coast and countryside, old and new, and is recognised as a major heritage area with many fine examples of Georgian and Victorian architecture in the City centre and Edwardian grandeur in Morecambe's seafront and promenade. Industrial heritage dominates in Carnforth a town built on railways and ironworking, with Heysham known for its power station – a significant source of local employment. The rural areas surrounding these urban centres also have a rich and varied history, containing areas of outstanding natural beauty and many small attractive villages.



The total population of the Lancaster district is 139,800[2], with population projections estimating that the population of the district will increase to just over 158,000 by 2033, predominantly due to an ageing population.

It is a high achieving area, with above average GCSE results and resident population educated to degree level and with a student population in excess of 20,000. Lancaster's status as a city of learning continues to contribute to its creative development and makes a major contribution to the local economy.

Whilst there is an overall appearance of affluence there are a number of areas of deprivation. Lancaster district is ranked as the 117th most deprived district out of 354 in the UK[3] (with 1 being the most deprived), with 14 of 89 Super Output Areas (SOA's) within the district ranked within the 20% most deprived in the UK (4 in the lowest 5%), most of which are located in Morecambe, highlighting that there are real pockets of deprivation within the district.

[2] Based on ONS (2009) Mid-year population estimates
[3] DCLG (2007) *'The English Indices of Deprivation'* – The IMD provides the most recent analysis of deprivation issues across England, and highlights key socio-economic issues which affect an area. The IMD rank is made up from data for specific domains, including income, employment, education, skills and training etc.

3.2 ACE Catchment Profiles

Annually, ACE undertakes an update and provides an Area Profile Report to arts organisations to enable them to better understand their catchment areas. These reports are based on data from the Census of Population (2001), Target Group Index (TGI) and CACI Acorn data supplied to ACE, which combines geography with demographic and lifestyle information, to provide a snapshot to arts organisations in terms of understanding their customer base and target markets. These reports are made available on a geographic basis, either by defined postal or census geographic area, or by specifying a drive time from a postcode point. The following series of tables provide a summary of the key demographic and lifestyle catchment data.

Figure 3.1: Drive time profile from LA1

The table below provides a summary of key demographic characteristics of the Lancaster catchment population.

Table 3.1: ACE Area Profile for Lancaster

	LA1, Lancaster (15 mins)	LA1, Lancaster (30 mins)	Lancaster District	Lancashire	North West
Population					
Total Population	125,930	273,760	133,979	1,134,803	6,729,722
Total Households	52,548	113,987	55,911	468,740	2,812,631
Ethnic group					
White	97.7%	96.6%	97.8%	94.6%	94.4%
Other	2.3%	3.4%	2.2%	5.4%	5.6%
Economic Activity					
Economically active	61.2%	64.1%	61.5%	65.2%	63.9%
Economically inactive	38.7%	35.9%	38.4%	34.7%	36.1%
Occupation					
Managers and senior officials	12.2%	13.4%	12.5%	14.0%	13.7%
Professional occupations	11.0%	11.5%	11.3%	10.6%	10.5%
Associate professional and technical	12.7%	12.7%	12.6%	12.5%	12.8%
Administrative and secretarial	11.2%	11.7%	11.1%	12.4%	13.1%
Skilled trades	12.0%	12.9%	12.5%	12.8%	11.7%
Personal service	9.5%	8.4%	9.4%	7.9%	7.6%
Sales and customer service	9.6%	8.8%	9.2%	7.9%	8.3%
Other employed	21.8%	20.5%	21.4%	22.1%	22.3%
Education					
Higher education / vocational qualifications	19.3%	20.5%	20%	17.6%	17.2%

Source: Census (2001)

The table above highlights the following key demographic characteristics in relation to people living within 30 minutes drive time of central Lancaster (LA1):

- there are circa 270,000 people living within the 30 minute catchment;
- 64% of the population are economically active, with this marginally above the regional average;
- 38% of the resident population are in managerial and professional occupations, with this marginally above the regional average; and,
- 20.5% of the population are educated to higher educational qualifications, with this significantly above Lancashire (17.6%) and North West averages (17.2%).

As identified in Tables 3.2 and 3.3 below, within 30 minutes of central Lancaster there is an above regional average of wealthy achievers, urban prosperous and comfortably off residents, with an above regional average readership of quality newspapers and mid-market tabloids. This demographic would suggest a customer base with available disposable income that the arts organisations and venues are looking to access.

Table 3.2: Lancaster Catchment - ACORN Categories

	LA1, Lancaster (15 mins)	LA1, Lancaster (30 mins)	Lancaster	Lancashire	North West
Population	115,198	250,309	122,170	966,306	5,719,822
Wealthy Achievers	15.0%	29.0%	18.4%	26.0%	21.0%
Urban Prosperity	9.1%	6.1%	8.8%	3.2%	5.5%
Comfortably Off	44.0%	38.0%	42.6%	33.2%	31.1%
Moderate Means	15.4%	11.4%	14.6%	23.2%	19.2%
Hard Pressed	11.2%	12.9%	10.7%	13.2%	22.2%
Unclassified	5.3%	2.7%	5.0%	1.2%	1.0%

Source: CACI (2009)

Table 3.3: Newspaper Readership

	LA1, Lancaster (15 mins)	LA1, Lancaster (30 mins)	Lancaster	Lancashire	North West
Population	115,198	250,309	122,170	966,306	5,719,822
Guardian / Observer / Independent	4.2%	4.3%	4.3%	4.1%	4.0%
The Times / Sunday Times / Financial Times	5.1%	5.6%	5.2%	5.1%	4.7%
Daily Telegraph / Sunday Telegraph	4.1%	4.7%	4.3%	4.5%	4.1%
Regional morning	4.3%	4.3%	4.2%	4.4%	4.8%
Regional evening	4.9%	4.8%	4.9%	4.8%	5.0%
Mid-market Tabloids	18.8%	19.5%	18.8%	18.8%	17.4%
Popular Tabloids	28.4%	26.8%	27.9%	28.4%	29.8%

Source: TGI (2009)

Table 3.4 below sets out the % market penetration of a set of art, cultural, heritage events / attractions/ performances during 2009.

Table 3.4: Arts, cultural, attraction attenders

	LA1, Lancaster (15 mins)	LA1, Lancaster (30 mins)	Lancaster District	Lancashire	North West
Adult Population	115,198	250,309	122,170	966,306	5,719,822
Plays (once)	31.6%	32.6%	31.8%	31.5%	30.5%
Plays twice or more a year	10.7%	11.4%	10.9%	10.6%	10.2%
Opera	9.1%	9.5%	9.3%	8.9%	8.7%
Ballet	9.2%	9.5%	9.3%	8.9%	8.5%
Contemporary Dance	7.8%	7.6%	7.8%	7.3%	7.5%
Classical Music	17.4%	18.1%	17.5%	17.1%	17.0%
Jazz	10.8%	10.9%	10.9%	10.4%	10.3%
Art Galleries / Art Exhibitions	29.3%	29.9%	29.5%	28.5%	27.8%
Art Galleries / Art Exhibitions twice or more a year	11.8%	11.9%	11.9%	11.4%	11.8%
Any performance in a Theatre (once)	45.2%	46.7%	45.5%	45.1%	43.1%
Any performance in a Theatre twice or more a year	17.7%	18.6%	17.8%	17.6%	16.8%
Cinema	63.2%	63.2%	63.2%	63.0%	62.2%
Pop / Rock	41.3%	40.7%	41.2%	40.9%	39.8%
Museum visit in last 12 months	33.6%	33.6%	33.5%	33.1%	32.3%
Museum visit in London in last 12 months	14.4%	14.6%	14.5%	14.2%	13.8%
Other museum visit in last 12 months	25.2%	25.6%	25.2%	25.9%	25.1%
Stately home or Castle visit in last 12 months	23.4%	24.4%	23.7%	23.7%	22.9%
Archaeological site visit in last 12 months	7.9%	8.2%	8.0%	7.9%	7.7%

Source: TGI (2009)

The table above highlights the following key findings in relation to the market penetration by activity of people living within 30 minutes drive time of central Lancaster during 2009, compared with other defined areas:

- The highest market penetration levels among residents included the cinema, any performance in a theatre and pop/rock;
- In terms of plays, the market penetration of those who made one attendance was 32.6% of residents, while the penetration of those who had attended twice or more was 11.4%, ahead of the Lancashire and regional averages;
- In relation to at least one attendance at a theatre, the market penetration 46.7% of residents, while the penetration for those attending twice or more was 18.6%, again ahead of the Lancashire and regional averages;

- In terms of art galleries/exhibitions, the market penetration was 29.9% of residents, and for multiple attendance it was 11.9%.

3.3 DCMS 'Taking Part Survey' (2008/09)

Taking Part is a major, continuous survey of leisure, cultural and sport participation in England, commissioned by DCMS in partnership with Arts Council England, Sport England, English Heritage and the Museums, Libraries and Archives Council, and has been conducted since 2005.

Annually, it collects detailed information from adults in England (aged 16 and over) about their attendance at a wide variety of arts events, museums, galleries, libraries and heritage sites, and about their participation in creative activities and sport. The data is collected by TNS-BMRB Social Research in face-to-face interviews. For the 2008/09 survey, the sample size for *Taking Part* in the North West region was 1,913 (national sample size 14,452). The following tables have been sourced from the regional *Taking Part* analysis and provide a summary of the key findings from the survey, which although not directly comparable to the TGI data presented above, do help provide a broader regional and national back-drop against which to view the level of activity seen in Lancaster.

Figure 3.2 below shows that the levels of attendance and participation are marginally lower in the North West than nationally. Over the 2008/09 period, 65% of adults in the North West attended an arts event at least once and 40% participated in artistic activities at least once, with 26% of adults in the North West neither attending nor participating in any form of arts activity.

Figure 3.2: Proportion of adults attending and participating in the arts in the past 12 months (at least once)

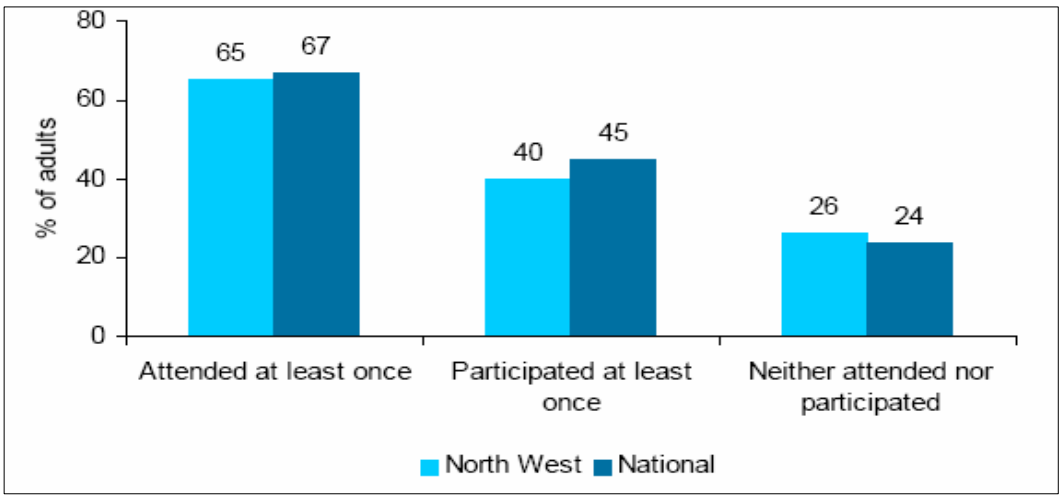
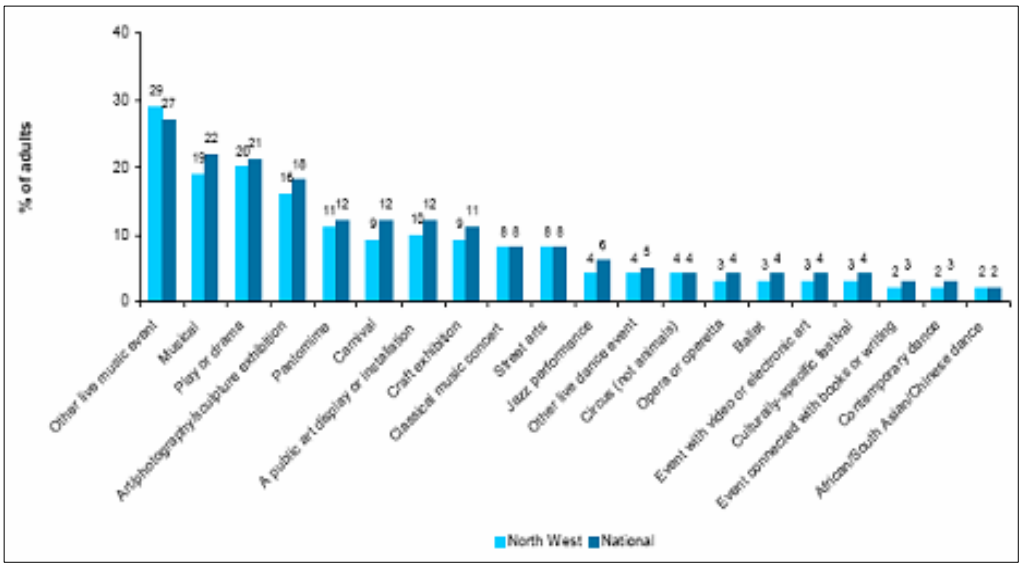


Figure 3.3 overleaf shows the proportion of adults in the North West and in England who had attended each of the art forms measured by *Taking Part* at least once during the last 12 months. Attendance at the majority of the art forms was lower in the North West than nationally. In line with national trends, other live music events (not classical or jazz, 29%), musicals (19%) and play or drama events (20%) had been attended by the highest proportion of people in the North West.

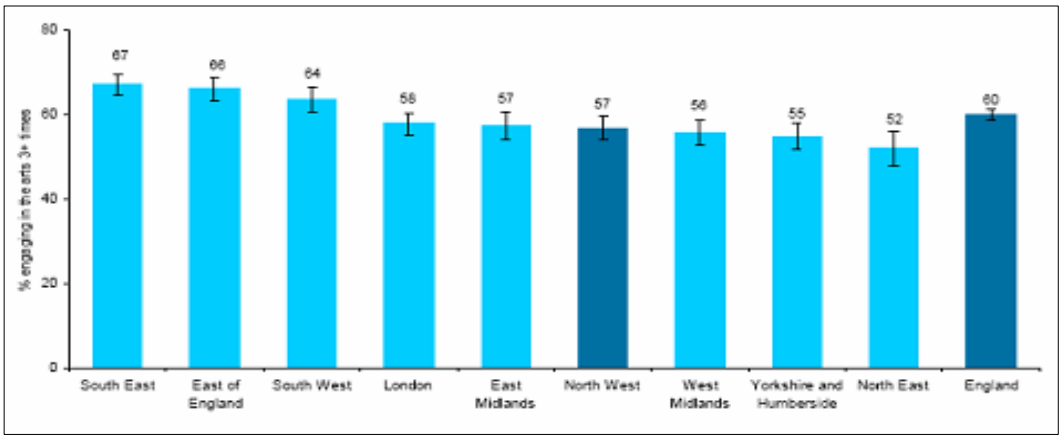
Figure 3.3: Attendance by art form (at least once during the past 12 months)



To assess overall performance, ACE calculates the proportion of people who engage in the arts at least three times a year, whether it be through attending arts events, participating in arts activities, or a mixture of both. In 2008/09, the level of adult engagement at three or more times in the North West (57%) was lower than compared with the national picture (60%).

When compared to other regions, the proportion of adults living in the North West who had engaged three or more times was significantly lower than that seen in the South East, East of England, South West and London. There was no statistically significant difference with the proportion seen in all other English regions. Figure 3.4 presents this analysis.

Figure 3.4: Proportion of adults engaging in arts 3 or more times in the last 12 months



3.4 Arts activities in Lancaster district

The Lancaster District is home to a wealth of art and cultural activities covering many art-forms and providing opportunities to develop creative skills across all sectors of the population. The following provides a brief snapshot of the activities of the seven district ACE funded RFOs, a summary of the investment into the arts sector in the district and a mapping exercise of wider arts and cultural activities.

3.4.1 Lancaster Arts Partners – Regularly Funded Organisations

ACE currently provides investment support to 850 RFOs across England. Within the region, ACENW currently provides investment to 107 RFOs, with seven located in Lancaster. This represents an above average concentration of support for a district, and is a recognition of the excellence and innovation in arts within the district, particularly in the fields of dance, digital media, and live performance. Section 4 below provides more detailed analysis on the seven RFOs in Lancaster, with table 3.5 below providing a brief snapshot of the scale and diversity of activities and events taking place in Lancaster during 2009/10.

Table 3.5: LA Partner Activity (snapshot 2009 / 10)

		Summary description	Activities / events 2009-2010
The Dukes	*The Rake*	Traditional 'end-on' stage performance area with a 313 capacity with stadium style seating and an end on stage allowing full visibility from all seats	2 home produced productions 17 visiting productions/events
	The Round	A new 240 seat theatre space which is circular in shape, but can also be transformed into a horse shoe shape depending on performance requirements	2 home produced productions 26 visiting productions/events
	Cinema	The Dukes' has been operating its own independent cinema since 1971, and presents a selection of independent cinema and current releases.	450 film screenings
	DT3	DT3 presents a year-round arts participation programme in partnership with Lancashire County Council Young People's Service, providing young people with opportunities to take part in, and to create original work.	15 audience events, 385 workshops, 157 outreach with schools
	Williamson Park	Every year the Dukes stages an outdoor promenade theatre production at Williamson Park (this year it was Peter Pan), which attracts thousands of visitors from all over the UK.	1 home production per annum
	Gallery	The Gallery, which is open every day and has free entry, presents work from some of the region's top artistic talent. It can also be hired for events / meetings.	Gallery space for predominantly regional artists
Ludus		A leading UK professional contemporary dance company which devises work for young people and first-time dance audiences, offers community projects and classes for all ages / abilities etc, manages the NW flagship youth dance company LYDC and co-promotes the Lancashire Youth Dance Theatre Festival.	5 performances 990 activities / classes
More Music		Runs workshops, professional training, community festivals, live music nights and a programme of classes across a breadth of musical activity, involving people of all ages/abilities/cultures/backgrounds.	150 performances 1,371 classes / activities
Litfest		The organisation seeks promote literature events in the area, so that local people have free or affordable access to develop as writers, engage with contemporary literature and celebrate literary excellence.	94 performances / events 55 classes / activities
Storey Gallery		Located in a purpose-built gallery in the Storey Institute, the Gallery nurtures, commissions, promotes, and presents innovative and challenging contemporary visual art.	5 exhibitions / events 7 activities / classes
Lancaster University	*Nuffield Theatre*	One of the most important venues in the UK for experimental and contemporary performance, the theatre has a capacity for 250 people	38 performances
	Concert Series	Held in the University's Great Hall, the Concert Series runs between October and March, and offers a programme of concerts, music and events to the public	17 concerts
	Peter Scott Gallery	The Gallery is open to the public free of charge, and presents a varied programme of temporary exhibitions, including the University's international art collection	9 exhibitions
folly		A leading digital arts organisation working across England's North West, that presents a year round diverse and innovative programme of online projects, events, festival activities, artist commissions, exhibitions, artist residencies, workshops and conferences providing creative interaction and collaboration between artists and the wider public using technology.	35 performances / events 12 activities / classes

3.4.2 Investment in the Arts

Nationally, arts funding is distributed by the Arts Councils and in the case of Lancaster District it is ACE North West. It comes in two forms:

- Core funding, which is core revenue support. The recipients are called RFOs. Historically an RFO has a funding contract for a 3 year period which for most is renewed; and,
- Project funding on an ad hoc basis which is bid for on an annual basis for a specific project or initiative under the Grant for Arts (GfA) fund.

ACE, along with Lancaster City Council and Lancashire County Council have continued to provide support to Lancaster artists and arts organisations for many years. Indeed for most Partners there is what is referred to as the 'tri-partite' agreement recognising the continuous and strategic importance of the artistic, economic, social and educational outputs of the seven RFOs work. This agreement between the funding partners is a mutual arrangement for continuing to support the RFOs with core funding. In turn, the RFOs sign a service level agreement against the funders' objectives.

Lancaster County Council spends the highest proportion of its arts support in Lancaster District and requires the organisations receiving grants to have a county-wide impact. The rationale for concentrating investment into an area which is also supported by ACE is that it helps build capacity for delivering arts provision across the county, and in so doing, supports the development of a centre of excellence in one geographical area. As outlined in the introduction, Lancaster district receives the third highest level of ACE funding support in the North West, behind the region's two major cities of Manchester and Liverpool. However, at the sub-regional level, the value of awards to RFOs in Lancashire county is significantly lower, per head of population, than for all other counties apart from Cheshire. Table 3.6 shows the detail of ACE funding across the North West region, highlighting that Lancashire county (including Blackburn with Darwen and Blackpool Unitary authorities) receives the equivalent of £1.08 of ACE funding per head of population, compared with a regional average of £3.47, and lags significantly behind the levels provided to Merseyside at £5.92 per head, Greater Manchester at £4.74 per head and Cumbria at £4.00 per head.

Table 3.6: ACE funding across the North West

	Population (2009)	Number of RFOs	Amount of RFO allocations 2010-2011 (£)	Amount per head of population (£/head)
Cheshire	1,005,800	4	£444,600	£0.44 / head
Cumbria	495,000	18	£1,979,855	£4.00 / head
Greater Manchester	2,601,000	45	£12,335,974	£4.74 / head
Lancashire (incl. Blackburn with Darwen & Blackpool UA's)	**1,585,500**	**15**	**£1,714,085**	**£1.08 / head**
Merseyside	1,350,600	24	£7,999,204	£5.92 / head
North West Region	7,037,900	106	£24,473,718	£3.47 / head

Table 3.7 below maps the level of core funding that has been provided by ACE, Lancashire County Council and Lancaster City Council to Lancaster's 7 RFOs each year since 2005. Whilst table 3.7 shows the core of the arts funding in the district being channelled into these 7 RFOs, it must also be recognised that organisations in the district attract additional resources through the ACE Grants for the Arts programme, alongside additional Lancashire County Council resources for arts activities in libraries, museums and schools and Lancaster City Council's investment in the Platform in Morecambe and festivals and events held across the district. In addition, there is support for the arts from additional sources such as trusts, charities and foundations, as well as some modest support via private sector sponsorship.

Table 3.7 also highlights that Lancaster University has also been providing between c. £300,000 and £350,000 of support each year since 2000 for Live at LICA's activities. The table also shows the effects at the Dukes as a result of the ACE challenge to the Dukes' management to raise its game, halving the amount of core funding provided in 2008/09 compared to previous years.

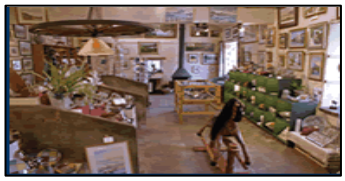
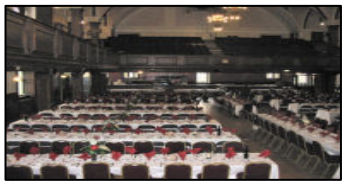
Table 3.7: Core funding across Arts Partners (2005-2010)

		2005/06	2006/07	2007/08	2008/09	2009/10
The Dukes	ACE	£493,796	£507,400	£521,400	£260,700	*£267,738*
	Lancashire County Council	£162,907	£166,611	£170,339	£174,492	£179,514
	Lancaster City Council	£155,800	£159,400	£162,300	£165,300	£147,600
	Total	£812,503	£833,411	£854,039	£600,492	£594,852
Ludus Dance	ACE	£259,381	£273,120	£280,000	£287,560	£295,324
	Lancashire County Council	£26,075	£27,200	£27,924	£28,604	£29,426
	Lancaster City Council	£28,400	£23,650	£29,200	£31,550	£21,850
	Total	£313,856	£323,970	£337,124	£347,714	£346,600
More Music	ACE	£30,146	£53,000	£54,500	£55,972	£67,166
	Lancashire County Council	£15,400	£23,600	£24,638	£29,400	£27,810
	Lancaster City Council	£10,300	£10,600	£10,000	£10,000	£10,000
	Total	£55,846	£87,200	£89,138	£95,372	£104,976
Litfest	ACE	£53,000	£53,000	£54,500	£55,972	£67,166
	Lancashire County Council	£14,350	£14,708	£17,500	£17,828	£18,475
	Lancaster City Council	£8,400	£8,400	£8,800	£9,000	£9,100
	Total	£75,750	£76,108	£80,800	£82,800	£94,741
Storey Gallery	ACE	£17,492	£30,000	£30,900	£31,734	£32,591
	Lancashire County Council	£0	£0	£0	£0	£0
	Lancaster City Council	£9,675	£39,568	£35,126	£34,900	£35,100
	Total	£27,167	£69,568	£66,026	£66,634	£67,691
Live at LICA	Lancaster University	£298,437	£326,183	£319,869	£348,003	£354,130
	ACE	£63,040	£80,000	£82,200	£84,419	£97,082
	Lancashire County Council	£844				
	Lancaster City Council					£500
	Total	£362,321	£406,183	£402,069	£432,422	£451,712
folly	ACE	£39,095	£137,500	£142,000	£145,834	£149,772
	ACE Recovery	£119,028	£138,600			
	Lancashire County Council	£0	£0	£0	£0	£0
	Lancaster City Council	-£2,064	£10,299	£5,500		
	Total	£156,059	£299,699	£156,200	£153,534	£161,197
Total Core Funding	**Lancaster University**	**£298,437**	**£326,183**	**£319,869**	**£348,003**	**£354,130**
	ACE	**£955,950**	**£1,134,020**	**£1,165,500**	**£922,191**	**£976,839**
	Lancashire County Council	**£219,576**	**£232,119**	**£240,401**	**£250,324**	**£255,225**
	Lancaster City Council	**£210,511**	**£251,917**	**£250,926**	**£250,750**	**£224,150**
	Total	**£1,684,474**	**£1,944,239**	**£1,976,696**	**£1,771,268**	**£1,810,344**

Table 3.7 shows only the important core funding received by the Arts Partners. Both ACE and Lancashire County Council have provided project funding, notably to Storey Gallery and folly. Details of this funding is in the individual partner profiles in section 5.

3.4.3 Venues in the district

In addition to the RFOs, the district benefits from a mix of venues and spaces suitable for performance and presentation. Although the following is not an exhaustive list, as it does not include the wide range of live music / stand-up comedy venues such as pubs and social clubs and wide range of gallery space in the district, however, it provides a flavour of some of the key arts venues across the district.

Table 3.8: Other arts venues across Lancaster district	
Wolf House Gallery, Silverdale Located in a renovated farm building with views across Morecambe Bay, the Gallery has an exciting collection of traditional and contemporary arts, crafts and gifts.	
Green Close Studios, Melling Green Close Studios is a visual art organisation based in the village of Melling. Set in a stone barn in the Lune Valley, the open-plan studio provides creative workspace for artists, and delivers rural and community development through the arts.	
Whirlwind Theatre for Children Formed in 1999 in south-west England, and recently establishing its base in Lancaster, the Whirlwind Theatre produces music-based theatre for and with children.	
Ashton Hall / Town Hall Located in Lancaster Town Hall, Ashton Hall is available to hire with a capacity of 800 (theatre style) or 250 (seated dining). It has been used in the past for a number of events, including community singing, organ recitals, and Christmas carol services.	
Lancaster Cathedral A focal point for the Catholic diocese, the Cathedral is home to a vibrant parish community and hosts a number of concerts and cultural events throughout the year	

The Grand Theatre A major part of the social and cultural life of Lancaster, the Grand is an independent venue that is home to the Lancaster Footlights Amateur Dramatics, and presents amateur drama, music and dance, as well as a wide range of professional artists and acts, particularly music and comedy. The theatre contains 460 seats and in 2009/10 sold approximately 50,000 tickets.	
The Platform, Morecambe One of two Lancaster City Council-owned live performance venues, located in a converted Victorian-style building that was formerly the old railway station building. This venue provides a capacity of 1,000 standing and 350 seated.	
The Dome, Morecambe [Now Closed] Located on the promenade in Morecambe, the Dome was the second of the Lancaster City Council-owned venues in Morecambe, with an audience capacity of 500-950 (mixed standing and seating). Once a key venue for cultural arts activity, the Dome closed in 2010, and a contract for its demolition in early 2011 has been let.	
The Winter Gardens, Morecambe Built as The Victorian Pavilion Theatre, the Morecambe Winter Gardens is located on the central promenade and has a rich history of performing arts. The theatre staged its last performance in 1977. It was externally renovated during the mid-1990's and has now been taken over by the Friends of the Victoria Pavilion who are dedicated to its eventual restoration. Currently, the building is in occasional use only.	
Musicians Co-operative, Lancaster Opened in 1985, as a not for profit organisation dedicated to providing musical services and recording studio space for local musicians.	
The Gregson Arts & Community Centre, Lancaster A commercial arts and community centre that seeks to provide arts, education, recreation and leisure to the local community.	
Luneside Artists Studios Luneside Studios is an arts collective of over 25 years, that provides space for visual artists working in various media.	

3.4.4 Mapping the scale of arts activities across Lancaster district

As part of this study, a wider mapping exercise of the scale of arts activities in the district has been undertaken. Four approaches have been considered, and three used, to try and map the scale of activity across the district. These are:

1. Standard Industrial Classification (SIC) using NOMIS based on Office for National Statistics data;
2. Yell.com data available through the Experian National Business Database;
3. Betamodel[4];
4. Google search and bottom up listing of known arts organisations by LAP partners.

This mapping exercise provides both an understanding of total district-wide arts activity and supports the economic impact assessment of the arts sector in Lancaster as assessed later in Section 6.

Whilst DCMS provides a definition of creative industries, there is no commonly accepted definition of the arts sector. Given similar work also being undertaken by Liverpool Arts Regeneration Consortium (LARC) at the current time, we have drawn on a definition of 'arts activities' that is consistent with this LARC work but which also enables us to make use of the available secondary economic data.

A detailed report on the methods used to arrive at the findings of this exercise is in the Annexes to this report. In summary, the databases available through Standard Industrial Classification (SIC) using NOMIS and Yell.com data available through the Experian National Business Database were found to be not sufficiently comprehensive in that they did not include many businesses and venues known to the Partners and/or listed in local directories and event listings. Whilst national databases are useful in giving guidelines on the average number of employees in the sector, and in providing benchmarks with the regional and national position, the fact that there were so many omissions meant that these sources were not suited for the mapping exercise of the arts supply in Lancaster district as the numbers did not reflect the real levels of activity in art, music, dance, drama and literature across the district.

Google search and 'bottom-up' local knowledge

As indicated, from the discussions held with the Partners and the initial review of nationally held databases, it was realised that the task would need to be done on a bottom-up basis, using local knowledge and local sources. As such, as part of this study, an extensive bottom-up search has been undertaken. This was started by GENECON using Google as the main search tool and supplemented by the LAP Partners applying their own local knowledge and contacts with suppliers. This exercise has resulted in the development of a much more comprehensive list of businesses and individuals working in activities ranging across performing and live arts, visual arts and crafts and literary creation. There has also been consultation with Lancaster City Council on the list to try and make it as accurate as possible.

Table 3.11 below provides a summary from this list of the overall spread of arts activities within the LA1 to LA6 postcode areas. The full list of businesses and organisations is

[4] Although not applied in this study, a further possible approach to mapping arts activity involves the application of the Betamodel. This can be used to provide snapshots of the creative industry sectors and is able to get around some of the limitations associated with SIC classifications and ABI restrictions. It allows for the production of up-to-date data (with a 3 month time lag) and draws on various data sources including the Experian National Business Database. This enables analysis of Yellow Pages categories at 5 digit SIC subclasses in order to provide a more accurate and detailed picture of the sector. Betamodel is also able to take account of some self employment.

attached at Annex 1. In total, this exercise has identified 602 businesses and organisations located in the district within the arts sector.

Table 3.11: Outcome of "bottom-up" investigation of arts supply in Lancaster district

Organisation type	Number of organisations (LA1-LA6)	
	Total	Number
Museums	**5**	*5*
Arts & Crafts	**190**	
Artists/Artists& Illustrators/Art Photographers		*114*
Art Galleries		*20*
Art & Craft Equipment & Materials		*10*
Woodcarver/worker/sculpture/mosaics		*10*
Textile/Clothing design		*7*
Potters/Ceramics/Glass artists/Others		*29*
Dance	**31**	
Dance schools		*19*
Dance tutors, performers		*7*
Dancewear retailers		*5*
Literature	**52**	
Authors & Script Writers		*32*
Book Publishers and book binders		*9*
Books suppliers - rare and secondhand		*9*
Literature Arts Organisations		*2*
Music	**130**	
Musicians		*31*
Bands		*43*
Orchestras / choirs		*11*
Music Teachers/ Music Schools/Courses		*39*
Musical Instrument Tuning & Repair		*6*
Music supplies, services & distribution	**81**	
Live music venues		*53*
Musical Instruments & Music Shops		*6*
Music Management & Promotion/Other activities		*12*
Recording Studios/ Sound Equipment hire & Installation		*10*
Theatre	**81**	
Theatres & Concert Halls/Ticket agencies		*12*
Theatrical Companies, professional(10) and Amateur (8)		*18*
Actors		*18*
Make-up/wardrobe/theatre design		*6*
Specialist production companies /OtherTheatrical Supplies & Services		*21*
Drama Schools/teachers		*5*
Entertainment	**22**	
Entertainers/ Stand comedy artists		*13*
Entertainment agencies/ Performing arts promoters		*2*
Stand Up Comedy Venues		*6*
Film	**10**	
Film Studios and Production services/Others		*8*
Digital Arts Organisation		*1*
Film & TV Production courses		*1*
Total number of arts organisations	**602**	

Source: Google, GENECON, Arts Partners and Stakeholders, 2010

The value of this bottom-up exercise is that it has thrown light on the extent of the economic activity in the arts in the district which has previously been unknown. Because so few of these people and entities appear on government or private sector databases

there is no record of them which would come up in a search for the supply of arts in the district. Yet their contribution, even though it comes from small businesses or organisations, is significant. Assuming a typical business / organisation size of between 2.0 - 3.5 employees (given the average of 3.4 from the Yellow Pages search), this would amount to between 1,200 – 2,100 people working in the arts sector across the district.

The presence of this cluster is likely to have been built up over many years and is consistent with the 30 year history of public sector investment in the arts in Lancaster district. To some extent this achievement appears to endorse Lancashire County Council's policy of supporting the development of a centre of excellence in Lancaster district. The 600 businesses and organisations are all within post codes LA1-LA6.

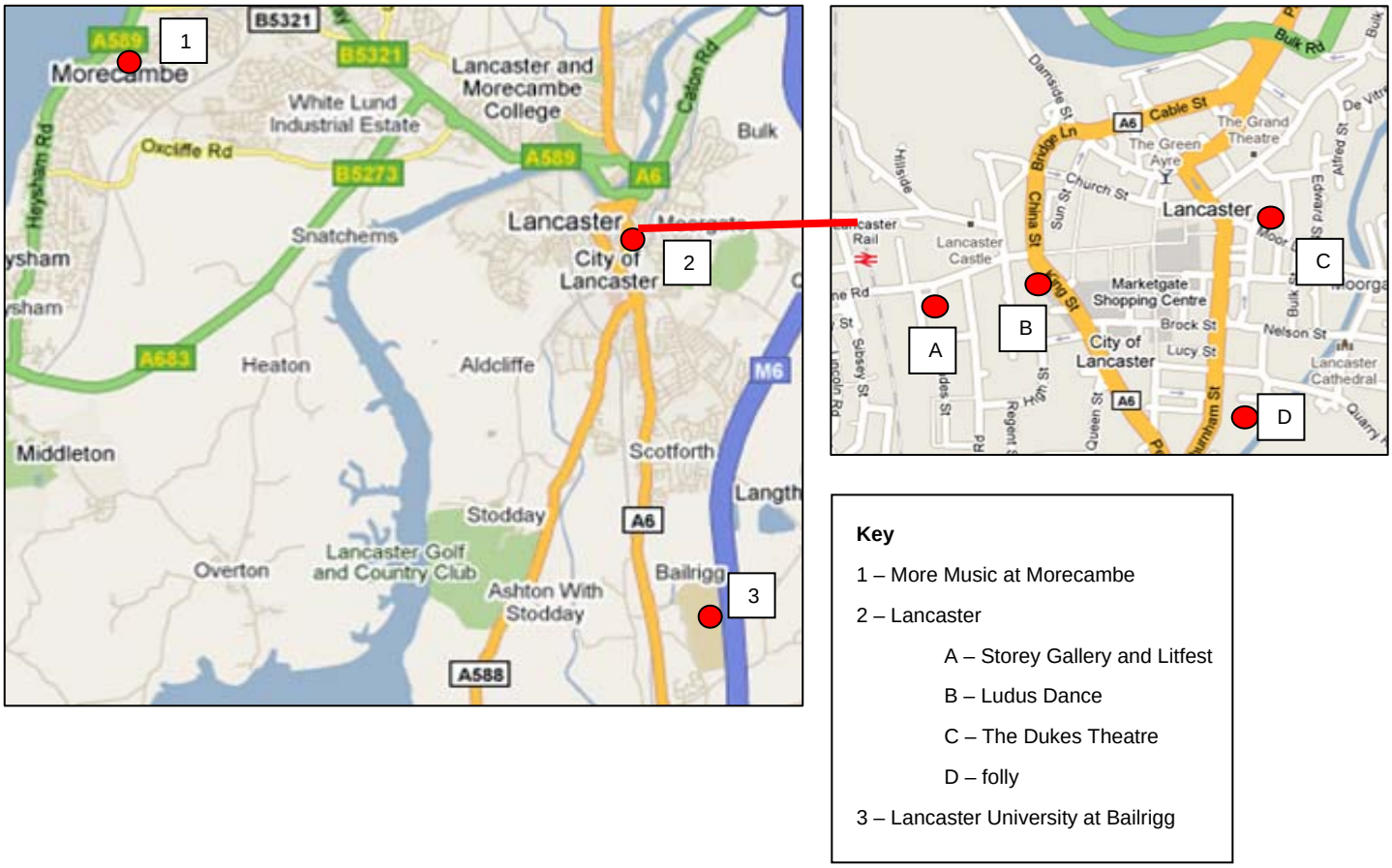
4 The Lancaster Arts Partners

4.1 Introduction

This section builds on the brief review set out in section 3.4.1 above, to provide a more detailed review of the seven RFOs funded through ACENW, Lancaster City Council and Lancashire County Council support. The purpose of these reviews are to demonstrate the range of activities across art forms that are being supported within the district and to outline some baseline information, which has been provided by the Partners to help inform the Economic Impact Assessment. They also show how the Partners' activities are meeting the policy requirements of their funders as set out in section 3.

As highlighted, there are currently seven ACENW supported RFOs within Lancaster district, and these organisations and venues play a pivotal role in the artistic and cultural offer of the district. These organisations all form part of the Lancaster Arts Partnership[5] that was formed out of a collective determination to realise the potential of opportunities in the arts and cultural sector, tackle funding / resources issues, and build project / programmes to inspire local people and attract visitors the area. Figure 4.1 below illustrates the close geographic proximity of these arts organisations and venues within the district.

Figure 4.1: Lancaster Arts Partners' locations



[5] Other non-RFO supported organisations that are members of the Lancaster Arts Partnership include: The Whirlwind Theatre for Children, Lancaster Grand Theatre, Green Close Studios and the Lancaster Music Co-operative.

4.2 The Dukes Theatre

History and Facilities

The Dukes was founded in 1971, with support from Lancaster Council, located in the former St. Anne's Church. Today it is a producing theatre which also offers visiting productions, comedy, music and a film programme that acts as a unique cultural centre and resource for Lancashire.

The Dukes has three performance spaces:

1. The Rake - traditional 'end-on' stage performance area with a 313 capacity with stadium style seating and an end on stage that allows full visibility from all seats;

2. The Round – a new 240 seat theatre space which is circular in shape, but can also be transformed into a horse-shoe shape depending on performance requirements; and,

3. DT3 - a smaller performance space, that presents a year-round arts participation programme in partnership with Lancashire County Council Young People's Service, providing young people with the opportunity to take part in, and create original work.

The Dukes also operates its own independent cinema within the Rake, presenting a selection of independent films and current releases, screening 450 films per year. The Dukes Gallery is open every day and has free entry, presenting work from some of the region's top artistic talent, as well as being available to hire for events / meetings. The Dukes also offers a café / bar which was extended in September 2009.

Producing Theatre

The Dukes produces its own plays and presents visiting productions. This includes five home produced productions per year: one outdoor promenade theatre production at Williamson Park (this year it was Peter Pan) during the summer, which attracts thousands of visitors from across the UK; one Christmas production; and, three other productions located at either The Round or The Rake. The emphasis for these productions is placed on delivering work by new or emerging writers.

Young people development

The Dukes also offers over 14,000 participation opportunities to young people each year through development programmes, working in partnership with Lancashire County Council's Young People's Service. The programmes range from 'have a go' taster sessions for young people through to structured support for emerging professional companies. DT3's outreach programmes are available to schools county-wide.

Recent changes

The Dukes has undergone a period of change following a significant reduction in ACENW support in 2008/09. In response the Dukes Board set out a new business model and plans for organisational change and new capital investment to enhance the existing studio space and provide sound separation between the 2 auditoria. In line with this plan, the Dukes was successful in attracting £336,000 of NWDA and ACENW funding for the capital works. The successful implementation of this plan has increased ticket sales, mitigating the impact of the ACE funding cut.

The Dukes Business Plan Objectives (March 2010)

The vision for the Dukes, as set out in the Business Plan is *'to become one of England's outstanding small city theatres and cultural centres'.* The Corporate Priorities 2011-14 are:

- To continue to improve the quality of all of our work, developing artistic talent;
- To increase the numbers and diversity of our audiences;
- To enhance the work and influence of the Creative Learning Department;
- To diversify and increase income streams;
- To deliver outstanding customer care;
- To be a creative resource for Lancashire and the region;
- To enhance relationships with our core funding partners, develop new strategic partnerships and achieve core investment levels appropriate to the `new' Dukes; and,
- To further develop The Dukes' strategic leadership role.

The Dukes Revenue and Funding Profile 2005-2010

	2005/06	2006/07	2007/08	2008/09	2009/10
ACE (core funding)	£493,796	£507,400	£521,400	£260,700	£267,738
ACE (project funding)	-	-	-	-	£110,000
Lancashire County Council	£162,907	£166,611	£170,339	£174,492	£179,514
Lancaster City Council	£155,800	£159,400	£162,300	£165,300	£147,600
NW Vision	£13,500	£18,000	£18,000	£18,000	£18,000
Revenue ticket sales/programme sales	£493,909	£484,695	£433,281	£436,388	£537,600
Revenue bar / refreshments	£90,127	£86,007	£76,883	£76,188	£113,884
Other revenue (e.g. sponsorship / donations)	£13,470	£38,486	£32,103	£40,713	£64,602
Total revenue	£1,423,509	£1,460,599	£1,414,306	£1,171,781	£1,438,938

The Dukes staffing

Full Time Employees – 17

Part Time Employees – 32

Full Time Equivalent Total – 29

The Dukes audience / participation / event numbers

	2005/06	2006/07	2007/08	2008/09	2009/10
The Park outdoor event	11,707	13,003	9,745	11,280	11,881
The Rake	52,332	48,656	51,190	35,482	49,015
The Round	5,292	2,225	1,910	10,101	7,062
DT3	-	535	1,219	978	1,804
The Gallery ticketed events (not including exhibition attendance estimate)	249	1,331	1,027	413	609
Participations in events run by the Creative Learning Dept.	4,671	11,348	13,167	13,040	14,935
Totals	74,251	77,098	78,258	71,294	85,306

4.3 Ludus Dance

Brief History

Based in Lancaster for over thirty years, Ludus Dance has established a national reputation as a dance producer and education company, operating as a not for profit co-operative organisation. Ludus Dance contains two producing departments:

Ludus Touring Company

Ludus Touring Company creates and tours, nationally and internationally, contemporary dance-based performance, workshops and classes specifically designed to explore themes and issues relevant to young people.

Ludus Dance Development Department

Ludus Dance Development seeks to promote dance in all its aspects, be it artistic, educational, therapeutic, recreational or social, to provide a comprehensive range of dance activities for people of all ages, abilities, cultures and backgrounds, both locally and across Lancashire.

Ludus Dance Development offers: Dance centre classes and workshops in a range of dance forms held at the company's studio in Lancaster; County Dance including the Ludus Youth Dance Company providing a programme of classes, performances and touring for young Lancashire based gifted and talented dancers, and a programme of support for locally based professional dancers; and, additional services and support provided to artists including training, access to facilities and placements.

The portfolio of activities can either be time-limited or ongoing, and can be adapted to meet a range of contexts and needs. The major customers include: schools and colleges; local government arts, cultural and leisure services; health services; and, youth services. Ludus Dance has also won a number of awards, including the 'Digital Dance Award' and Granada TV's 'Flying Start Award' for Good Business Practise in the Arts.

Ludus Business Plan Objectives 2007-2010 (June, 2007)

The vision for Ludus is *'to play a key role in ensuring that dance is recognised as a significant force within society and to assist in the development and consolidation of dance as an art form which recognises cultural diversity and difference and is accessible to all through education, participation and recreation'*. Ludus Dance is currently undergoing a thorough organisational and strategic review. The new mission statement is *'Ludus Dance – opening doors to life-long engagement with dance'.* The key objectives are to:

- actively support regional artists by offering showcase platforms, training opportunities, rehearsal facilities and advice and information;
- maximise the potential of visits by touring dance artists to the region;
- strive towards a strategic, holistic approach to dance provision within Lancashire, where Ludus can act as a 'positive partner' for diverse dance activity;
- continue to clarify and progress company operation, policy and direction;
- raise awareness and keep abreast of health and safety issues in respect of the efficient and safe operations of company activities; and,
- contribute to the national debate regarding dance in education, dance development and community outreach work.

Ludus Revenue and Funding Profile 2005-2010					
	2005/06	**2006/07**	**2007/08**	**2008/09**	**2009/10**
ACE (core funding)	£259,381	£273,120	£280,000	£287,560	£295,324
ACE (project funding)	-	-	-	-	-
Lancashire County Council	£26,075	£27,200	£27,924	£28,604	£29,426
Lancaster City Council	£28,400	£23,650	£29,200	£31,550	£21,850
Sponsorship (and AmbITion Monies)	£6,000	£10,000	£13,974	£29,936	£20,087
Freelance, touring and class revenue	£164,618	£199,678	£150,460	£198,006	£226,572
Box office ticket sales revenue	£750	£750	£750	£4,375	£1,800
Venue hire revenue	£5,002	£5,023	£6,859	£5,337	£2,412
Total revenue	£490,226	£539,421	£509,167	£585,368	£597,471

Ludus staffing

Full Time Employees – 8
Part Time Employees – 10
Full Time Equivalent Total – 13

Ludus audience / participation / event numbers					
	2005/06	**2006/07**	**2007/08**	**2008/09**	**2009/10**
Dance Development ticket sales*	300	300	300	300	450
Class attendances	7,200	7,200	8,640	8,640	11,880
Total	7,500	7,500	8,940	8,940	12,330

* These do not include touring company ticket sales as they will be included in The Dukes' figures.

4.4 More Music

Background

More Music was founded in 1993 and is a community music organisation, based in the West End of Morecambe that works throughout Lancashire and beyond. More Music has undergone significant growth since its foundation. In 1996, More Music received a three-year SRB grant and a Capital Lottery Grant leading to the establishment of a 'Hothouse' in the ground floor of the Devonshire Hall. Over the next four years, the organisation grew in size and began to gain national recognition in developing community music projects and establishing a major local presence in Morecambe. In 2001, More Music became a charity, establishing the first Youth Music Action Zone in Lancashire, and with Lottery grant support, refurbished and re-equipped the 'Hothouse'. In 2008, the organisation purchased the whole Devonshire Hall building and has embarked on a refurbishment programme, in order to maintain More Music as a creative hub for Morecambe and beyond. Most recently this extended countywide with a programme of music sessions for young people with disabilities that were held in libraries and other centres.

Community music

More Music delivers a year-round programme of projects that covers the breadth of musical activity and involves people of all ages, abilities, culture and backgrounds. More Music run workshops, live music nights, community festivals and events, and professional training weekends for musicians and teachers from across the UK, and a programme of classes including samba clubs, guitar, hand drumming and singing. The organisation aims to build the confidence of individuals and communities through creative arts activities, particularly focusing on music-making activity. In 2006, More Music was awarded an 'art06' ACE award, which recognised the vital role the organisation has played in supporting local communities. It is recognised as one of the longest running and most highly regarded community music and education organisations in the UK and is used by ACE as a model of good practice.

Engaging young people

More Music manages the Lancashire Youth Music Action Zone for Youth Music, who fund and facilitate music-making for young people up to the age of 18, particularly those living in areas of social and economic need. In addition, More Music works with local schools and centres across Lancashire and throughout the region to deliver Sing Up – the Music Manifesto's National Singing Programme. There is also a programme of music sessions for young people with disabilities across the County that are held in libraries and other centres.

Community music

More Music delivers a year-round programme of projects that covers the breadth of musical activity and involves people of all ages, abilities, culture and backgrounds. More Music run workshops, live music nights, community festivals and events, and professional training weekends for musicians and teachers from across the UK, and a programme of classes including samba clubs, guitar, hand drumming and

singing. The organisation aims to build the confidence of individuals and communities through creative arts activities, particularly focusing on music-making activity. In 2006, More Music was awarded an 'art06' ACE award, which recognised the vital role the organisation has played in supporting local communities. It is recognised as one of the longest running and most highly regarded community music and education organisations in the UK and is used by ACE as a model of good practice.

Major projects

The organisation is also involved in organising and participating in a number of significant festivals and events within Morecambe, including: the annual Catch the Wind Kite Festival along the seafront; the West End Festival for the local community; and, the annual West End Christmas Lantern Festival. More Music has also worked on a number of one-off projects, including for example, 'The Long Walk', a large scale music project developed in response to the Morecambe Bay tragedy in 2004, in which 23 Chinese cockle pickers lost their lives. The work has led to 5 years development work in Hong Kong and mainland China.

More Music Business Plan Objectives 2007-2012 (March, 2008)

More Music aims *'to build confidence and spirit in individuals and communities through creative arts activities, particularly music'.* The key objectives of the organisation are to:

- create a home for the organisation that is an iconic symbol of the power of music in the community and develop a capital asset for the sustainable future of More Music;
- ensure a sustainable future for the organisation by identifying and securing funding;
- embed the creation of new work at the heart of the organisation's culture, infrastructure and planning;
- respond to the changing national agenda for music education by creating an integrated and effective programme of work;
- contribute to the regeneration agenda by working with local communities and agendas; and,
- maintain and develop the provision of music making for under 18's through the Youth Music Action Zone Programme.

More Music Revenue and Funding Profile 2005-2010

	2005/06	2006/07	2007/08	2008/09	2009/10
ACE (core funding)	£30,146	£53,000	£54,500	£55,972	£67,166
ACE (project funding)	£0	£10,000	£3,500	£38,028	£21,944
Lancashire County Council	£15,400	£23,600	£24,638	£29,400	£27,810
Lancaster City Council	£10,300	£10,600	£10,000	£10,000	£10,000
Other Local Authorities	£7,000	£7,000	-	£7,000	£32,975
Workshop fees and subs	£24,115	£42,937	£38,000	£113,622	£54,577
Performance fees	£23,320	£69,850	£50,160	£3,295	£12,335
Youth Music (DCMS)	£100,000	£120,000	£161,000	£150,000	£120,000
Partners	£30,000	£139,000	£120,000	£158,676	£136,830
Ticket sales / programme sales	£1,430	£15,168	£12,270	£3,439	£6,796
Other revenue (donations / grants / venue hire / trusts)	£9,100	£19,000	£23,364	£66,188	£68,498
Total revenue	£250,811	£510,155	£497,432	£635,620	£558,931

More Music staffing	
Full Time Employees – 5	
Part Time Employees – 27	Full Time Equivalent Total – 13

More Music audience / participation / event numbers					
	2005/06	**2006/07**	**2007/08**	**2008/09**	**2009/10**
Ticket sales	1,018	4,830	7,200	7,500	5,500
Audience numbers	39,525	14,572	26,300	27,700	28,425
Participations in activities / class	40,200[6]	5,942	4,551	5,200	6,118
Total	80,743	25,344	38,051	40,400	40,043

[6] 2005/06 was a year of increased activity at More Music due to funding received from the Duchy of Lancaster, SRB - Burnley (Dhamak Project) and extra funding from Lancashire City council.

4.5 Storey Gallery

STOREY GALLERY

Brief History

The Storey Gallery was founded in 1991, initially run by volunteers comprising a group of Lancaster-based artists and is located in a splendid purpose-built gallery in the Storey Institute. When the Gallery was established, it was the first of its kind in the district, providing free access for the community to a broad range of contemporary art. The Gallery was closed in 2005 as the whole Grade II listed Victorian building in which the Gallery was located, underwent a £3.4m refurbishment (supported by ERDF/ACE/NWDA) refurbishment to create the Storey Creative Industries Centre. During this period of renovation works, the Gallery had to leave its premises, and shifted focus away from exhibitions to a programme of off-site activities called INSIDE OUT that included artists' research commissions, talks on art, projects in public places, development work with local secondary schools, and a research project with Lancaster University. The Gallery itself was re-opened and re-launched in 2009 with the completion of renovation work.

Storey Gallery activities

The Storey Gallery is an independent artist-centred gallery in Lancaster that has a year-round programme of activity that promotes and presents the work of national and internationally significant contemporary artists. The Gallery is considered to be one of the best exhibition spaces in the North West, and provides the only opportunity in the local area for the presentation of large-scale artworks and installations.

Alongside the exhibition programme, the Storey Gallery also offers an education programme and participatory outreach projects, that seek to encourage people of all ages to engage with art and artistic practice, so that they can develop their own understanding, creativity and reflective skills.

Storey Gallery – Vision and Objectives (2005)

The vision for the Storey Gallery is *'to be a visual art organisation with a national reputation and international connections, which commissions, presents and promotes innovative and challenging contemporary art'.*

As set out in the Storey Gallery's Annual Report (2010), the organisations principle activity is to *'provide opportunities for experience, knowledge, and understanding, of contemporary visual art for a wide audience'.* The programme objectives include:

- to run a programme including exhibitions, commissions, and projects in the public arena
- to engage audiences with all activities, and provide opportunities for participation and learning, with an emphasis on young people
- to stimulate critical and creative thought, debate and reflection
- to work with artists of international acclaim
- to encourage and support emerging artists
- to provide support and professional development for artists
- to encourage artistic experimentation, innovation and risk-taking
- to contribute to, and advocate for, the development of visual arts practice

Storey Gallery Revenue and Funding Profile 2005-2010					
	2005/06	**2006/07**	**2007/08**	**2008/09**	**2009/10**
ACE (core funding)	£17,492	£30,000	£30,900	£31,734	£32,591
ACE (project funding)	£56,018	£51,558	£11,000	£7,750	£36,573
Lancashire County Council (core funding)	-	-	-	-	-
Lancashire County Council (project funding)	£21,000	£24,000	£12,850	£14,150	£13,000
Lancaster City Council	£9,675	£39,568	£35,126	£34,900	£35,100
Ticket sales revenue	£664	£1,325	£732	£603	£258
Trust and Foundations	£11,278	£2,404	£31,619	£48,880	£45,684
Other revenue (donations / consultancy)	£1,556	£1,936	£3,758	£2,409	£1,506
Total revenue	£117,683	£150,791	£125,985	£140,426	£164,712

Storey Gallery staffing
Full Time Employees – 2
Part Time Employees – 13
Full Time Equivalent Total – 3.5

Storey Gallery audience / participation / event numbers					
	2005/06	**2006/07**	**2007/08**	**2008/09**	**2009/10**
Number of visitors	4,067	9,519	1,301	627	6,191
Number of participations	133	254	319	222	307
Total	4,200	9,773	1,620	849	6,498

4.6 Litfest

Background

Litfest was first established in 1977, as the 'Lancaster Literature Festival', with the first festival held during the spring of 1978. The original founders were a group of local people, mainly working in higher education, who were interested in promoting literature events in the area. Since being established, the organisation has transformed into Litfest, a registered charity, and is now located within the Storey Creative Industries Centre.

Literary Programme

Litfest delivers a broad programme of literary projects and events throughout the year including an annual literature festival, and a programme of literary events and writing projects that seeks to engage people with literature. Litfest is also focused on working for the development of literature, as a result the current Litfest programme includes publishing and professional development through the Flax Books initiative.

This Flax programme supports and publishes upcoming writers in the North West. This initiative has firmly embedded the organisation's work with digital and the more traditional print media. While the professional development programme provides assistance to writers in developing their careers (through writing workshops that cover aspects of prose and poetry; bespoke programmes in professional development planning, skills exchange, marketing, coaching and one to one mentoring; and, seminars focused on the business of being a writer, covering topics such as business administration, earning multiple incomes and legal troubleshooting). Litfest has also been involved in a series of residences in Lancashire's correctional institutions and the publication of a book celebrating the regeneration of Morecambe's Midland Hotel.

Litfest Business Plan Objectives (2009)

The vision for Litfest is *'to be a leading contributor to the vibrant and successful literary activity of Lancaster, Lancashire and the North West. Through promoting literature events across the region, the organisation seeks to promote literature so that local people have free or affordable access to develop as writers, engage with contemporary literature and celebrate literary excellence'*. The key objectives for the organisation include to:

- be a regionally significant organisation;
- achieve audience and readership for the promotion and publication of writers;
- invest in the professional development of writers;
- create opportunities for writers, in particular those from the NW and the sub-region;
- to deliver participative reading and writing projects;
- broaden and enhance the education, appreciation and understanding of literature among writers and reader;

- underpin the ambitions stated above by being an artistically, operationally and financially robust organisation with effective governance; and,
- operate at a capacity which allows for opportunistic or reactive partnerships or projects to be developed and pursued.

Litfest revenue and Funding Profile 2005-2010

	2005/06	2006/07	2007/08	2008/09	2009/10
ACE (core funding)	£53,000	£53,000	£54,500	£55,972	£67,166
Lancashire County Council	£14,350	£14,708	£17,500	£17,828	£18,475
Lancaster City Council	£8,400	£8,400	£8,800	£9,000	£9,100
Ticket sales / Project activity / Book sales / Venue hire	£32,034	£52,248	£84,606	£105,592	£19,109
Other (e.g. sponsorship / donations, bank interest)	£ 831	£ 874	£ 929	£ 605	£ 247
Total	£108,615	£129,241	£166,335	£188,997	£114,097

Litfest staffing

Full Time Employees – 0

Part Time Employees – 5

Full Time Equivalent Total – 2.5

Litfest audience / participation / event numbers

	2005/06	2006/07	2007/08	2008/09	2009/10
Ticket sales	844	942	1153	1612	855
Audience / participation numbers	0	2,122	0	150	611
Total	844	3,064	1153	1762	1466

4.7 folly

Background

folly is a Lancaster-based leading digital arts organisation, which was founded as Folly Trust in 1989. folly seeks to provide an active artistic programme that provides creative interaction and collaboration between artists and the wider public to experience art through the use of technology, engaging new audiences and making the programme available to people whom access may normally be difficult.

folly programme

The folly programme involves support for creative work and innovation with a strong emphasis on the use of online media, networked systems and integrated technologies. In order to engage with the public and artists, folly delivers a year round programme of online projects, live events, festival activities, artist commissions, exhibitions, artist residences, workshops and conferences.

Some examples of the folly programme include the 'Abandon Normal Devices' (AND) festival – which is an annual event that showcases new cinema and digital culture around the region. This is a collaborative project between arts organisations FACT (Liverpool), folly and Cornerhouse (Manchester) that seeks to raise awareness of digital art.

The Portable Pixel Playground project developed a 21st century children's playground that travelled around the region during 2008. This provided a digital play space to encourage young people to use everyday technologies in new and creative ways, providing users with interactive, physical and hands-on new experiences of art and technology.

The Predict programme has focused on developing the next generation of arts leaders, through offering young people opportunities such as work placements, trainee positions, internships, mentoring and volunteering opportunities and develop relationships with further and higher education providers.

The Love Culture is a new online community which promotes making friends and the sharing of views about art and culture – to establish a social networking site for people who love culture.

A new programme, working with the Harris Museum and Art Gallery, is 'Current: An Experiment in Collecting Digital Art', that is focused on innovative and creative use of new media technology, to form part of a real-life case study for the collection and integration of digital artworks into existing permanent museum collections.

follyconsult

folly also provides consultancy services – follyconsult - which specialise in enabling people and organisations to be digitally literate and to openly explore the world through technology. The consultancy business is focused on providing support and advice to projects by drawing on its own

operational knowledge, arts sector experience and success in delivering a wide range of projects for arts organisations throughout the UK.

folly objectives

The objectives for folly include to:

- find critical, imaginative and challenging ways to be open and collaborative;
- be relevant to people and rooted in the everyday;
- explore a fusion between the virtual and physical cultural experience;
- question evolution and imagines how art and technology might alter our future way of life;
- encourage people to be a part of the work to create shared meanings and experiences;
- provoke open and challenging conversations; and,
- take risks by carving out new models of presentation and distribution.

folly revenue and Funding Profile 2005-2010

	2005/06	2006/07	2007/08	2008/09	2009/10
ACE (core funding)	£39,095	£137,500	£142,000	£145,834	£149,772
ACE (project funding)	£47,268	£32,308	£18,907	£9,000	£1,999
ACE Recovery	£119,028	£138,600			
Lancashire County Council (project funding)	-	£13,300	£8,700	£7,700	-
Lancaster City Council	-£2,064	£10,299	£5,500		
Other grants	£50,536	£29,543	£63,477	£70,843	£146,413
Other earned income/ interest	£11,686	£38,931	£51,898	£54,450	£14,155
Total	£265,549	£400,481	£290,482	£287,827	£312,339

folly staffing

Full Time Employees – 4
Part Time Employees – 7
Full Time Equivalent Total – 8

folly audience / participation / event numbers

	2005/06	2006/07	2007/08	2008/09	2009/10
Audience engagement figure*	12,783	36,224	130,616	147,487	185,012
Participations in activities / classes	-	577	188	372	348
Total	12,783	36,801	130,804	147,859	185,360

* understood to represent participation online through the 'Curated or Commissioned Online Creative Content'

4.8 Lancaster Institute for the Contemporary Arts (LICA)

Background

LICA encompasses Lancaster University's teaching and research activities in Art, Design, Film Studies, Music and Theatre Studies, with the UK government's recent Research Assessment Exercise placing Art and Design research at Lancaster, in the UK's top 3 universities with 80% of the research classed as world (4*) or internationally (3*) leading.

Lancaster University is also home to three significant arts venues: Lancaster International Concert Series; the Peter Scott Gallery; and the Nuffield Theatre, that were recently merged as 'Live at LICA' into a single interdisciplinary contemporary arts organisation for the campus, the city and the region, with a single staff, reporting, administrative and financial structure. Live at LICA therefore seeks to deliver theatre, dance, concerts and exhibitions of the highest calibre, alongside education and participation projects for local residents to encounter the creative process of innovative artists in unusual locations. In 2009/10, LICA delivered 9 World or UK premieres, completed 14 artists residencies, and launched 4 new public realm artworks.

Programme and facilities

The Lancaster International Concert Series

Presents an internationally recognised programme of visiting orchestras, soloists, and ensembles, as well as opera, and events for young people – many taking place within the Great Hall with its 600 seat capacity that has hosted music events like Opera North and the BBC Philharmonic. 'Meet the artist' sessions take place before most events, providing an insight into the creative process for the public and students. The education policy aims to develop a future audience for the series and to enrich the cultural lives of young people. The Series has a dedicated set of attendees, many of whom subscribe to a season ticket programme.

The Peter Scott Gallery

Founded in 1974, and opened to the public in 1975 (then called The Scott Gallery). The gallery moved across campus in 1988 to the Great Hall Complex, when it was renamed. The gallery presents a varied programme of temporary exhibitions and associated talks by contemporary artists. The gallery houses the University's international art collection of Japanese, Chinese and 20th Century artworks. Open to the public free of charge, the gallery also holds a significant collection of Royal Lancastrian ceramics and related archive material, which is on permanent display.

The Nuffield Theatre

The Nuffield Theatre has a respected tradition for presenting and commissioning experimental theatre, contemporary dance and live art. Many of the most important performance makers of the last 30 years have shown their work in the Nuffield Theatre, including Forced Entertainment, Station House Opera, DV8, Improbable and Goat Island. The theatre is nationally recognised for supporting emerging and experimental practice through its Nuffield New Works commissioning programme and its Emerging Artists scheme. This includes 12 commissions / co-productions of new theatre and dance pieces, which all toured nationally and / or internationally, including to Barbican, KunstenFestival Des Arts (Brussels), Festival Ad Werf (Utrecht), Zoom Festival (Croatia), Theatre Du Nord (Lille), WY Playhouse, Lowry, Bristol Old Vic and Warwick Arts Centre.

The Nuffield stage is large in size and is adaptable to any form of seating configuration. The venue has a width of up to 25 metres, and has a capacity of 230 people.

LICA objectives – Vision for the Public Arts 2009-2012

In terms of the arts at Lancaster University, the vision is to *'become a genuinely interdisciplinary 21st Century multi-arts organisation for the campus, the city and the region'.*

The key objectives as set out in the Live at LICA vision are to:

- develop cross-cutting public programmes of artistic activity of the highest quality, linked by themes, research questions and artistic movements, framed within or alongside academic research
- support the research and development of innovative new work, with a range of industry partners, for national and international touring; with a special focus on support for early career artists
- develop existing artform specialisms in theatre, music, dance and the visual arts, and develop new strands of public realm, film and digital arts activity, both on campus and in the region
- deliver unique targeted participatory and educational opportunities for local residents and young people
- take an active role in enriching and diversifying the experience of the University campus

LICA Revenue and Funding Profile 2005-2010

	2005/06	2006/07	2007/08	2008/09	2009/10
ACE	£63,040	£80,000	£82,200	£84,419	£97,082
Lancashire County Council	£844				
Lancaster City Council					£500
Lancaster University	£298,437	£326,183	£319,869	£348,003	£354,130
Box office / ticket sales	£55,335	£58,700	£57,000	£56,000	£47,500
Bar income and refreshments	£10,000	£12,000	£14,000	£14,000	£14,000
Sponsorship	£19,000	£15,750	£3,000	£5,000	£2,500
Programme sales / advertising space	£2,400	£3,000	£5,000	£2,500	£1,793
Venue hire	£2,750	£4,000	£10,000	£7,000	£6,399
Other revenue	£22,400	£20,500	£20,000	£13,000	£10,800
Total	£474,206	£520,133	£511,069	£181,919	£534,704

LICA staffing

Full Time Employees – 7 Part Time Employees – 5 Full Time Equivalent Total – 9

LICA audience / participation / event numbers

	2005/06	2006/07	2007/08	2008/09	2009/10
Concert Series	4,500	4,500	4,450	4,400	4,350
Nuffield Theatre	4,500	4,500	4,450	4,400	4,350
Peter Scott Gallery	8,000	7,000	6,600	5,200	11,650
Workshop / class attendance	1,447	2,434	3,314	2,969	3,550
Total	**18,447**	**18,434**	**18,814**	**16,969**	**23,900**

4.9 Wider benefits of the LAP partners' arts activities in Lancaster

This wider benefits analysis provides a qualitative assessment of the wider impacts that the LAP partners make to the Lancaster economy. Invariably with any economic activity, more so in the cultural sector, there are non-quantifiable benefits that are important to capture in the overall impact assessment.

As identified in the section 2.4.3, the Lancaster District Local Strategic Partnership's *'Sustainable Community Strategy'* (2008) sets out seven themes for achieving a high quality of life for local people. Section 2.4.3 outlines that the work of the 7 LAP partners particularly support 4 of the LDLSP's 7 priorities with regards to:

- Theme 1: Children and Young People;
- Theme 2: Economy;
- Theme 3: Education, Skills and Opportunities; and,
- Theme 7: Valuing People.

These themes are also part of Lancashire County council's strategy. The partners are funded by both councils and have ensured that their activities are aligned with the funders' strategies and are able to demonstrate their contributions in their annual reports to funders.

The rest of this section is structured around the contributions made by the partners against these themes.

4.9.1 Theme 1: Children and Young People

The varied activities of the LAP partners' make really important contributions to the lives of young people across Lancaster district, providing opportunities for active participation, learning and enjoyment for children and young people across the district.

The following provides some examples of the scale and breadth of the partners' activities in engaging with young people:

1. The Dukes Theatre - has very active involvement with young people, engaging with 84 school parties from across Lancashire in 2009/10, and has a designated performance space for young people's creative participation at its 'DT3' venue. In 2009/10, the Dukes' Creative Learning Department engaged with 4,547 young people throughout Lancashire via participation in 131 projects and events. This engagement has ranged across educational and creative development, along with traineeships and work placements, and in some cases accredited training and paid employment.

The work of DT3 targets a wide range of young people, including marginalised groups such as the homeless, Asian women, Gypsy, Roma and Traveller Groups, Young Offenders, and people with mental health issues. In 2009/10 productions at the Dukes attracted 13,571 young people (under 18) to the venue.

Based at DT3, the Dukes also delivered a series of initiatives that was targeted at key groups within the community. This includes a creative writing project with youth offenders; the 'Urban Crossover' project, which involved young people from local housing estates; the development of a promotional police DVD made by police cadets for young people; and, the engagement of young people with Lancashire Constabulary at DT3 through film and media, dealing with issues around persecution, prejudice, violence and stereo-typing within the community.

2. Ludus Dance - a key objective of the Ludus Dance Development Department is to increase the numbers of young people participating in dance and physical activity, particularly those from hard-to-reach communities (ethnic groups / disabled). As such, Ludus delivers a wide range of dance classes targeted at all types of young people, seeking to address 'difficult' issue-based themes relevant to different age groups.

During 2009/10 Ludus Dance engaged with 1,894 young people in the district through activities / classes. In terms of the social exclusion agenda, Ludus Dance also delivered dance activity programmes targeted at young people from two deprived local housing estates: Ridge and Marsh, and also worked on a project which sought to help combat anti-social behaviour in the region.

3. More Music - More Music manages the Lancashire Youth Music Action Zone for Youth Music which is targeted at young people up to the age of 18, particularly those living in areas of social and economic need. In addition, More Music works with local schools and youth centres throughout the district to deliver 'Sing Up', the Music Manifesto's national singing programme. During 2009/10, More Music led a total of 1,371 classes / activities, with More Music engaging with 6,118 young people.

For over ten years this has seen major programmes of work both in Morecambe and in virtually every district of the Lancashire. At the Hothouse in Morecambe weekly programmes have engaged young people in new creative musicmaking from Clapping Song (under 5's) to Orbit Jazz workshop (for more beginners and more advanced player), from Baybeat Carnival Band (an entry point project for drummers and dancers) to the massive STAGES project. This latter project gives 12-18 years olds opportunities to learn instruments, make new bands, rehearse and then perform in regular professional gigs. Over the last 3 years Community safety funding has enabled the Friday Night Project to address issues of teenage nuisance on Friday and Saturday nights and has brought hundreds of new young people into the building. It has also led to new work at other centres (DT3 and the Ridge) through the training and inspiration it has given to musicleaders from across the district.

Across Lancashire partnerships with youth centres and arts officers have seen some long programmes (Accrington and Burnley), other shorter projects, events and festivals and tours of performances. One result from the 4 year SRB funded community cohesion project in Burnley has seen the creation of a new Asian Music Organisation called Dhamak.

In addition, More Music works with local schools and youth centres throughout the district, county and across Merseyside to deliver 'Sing Up', the Music Manifesto's national singing programme. The organisation has a national reputation for its work with young people and works from entry point through progression and support of talented individuals.

4. folly - prides itself on its work with young people, supporting them to excel in arts, and helping them with their future prospects and digital media skills.

'Predict' is a digital arts programme that offers mentoring, internships, work placements, trainee positions, volunteering opportunities and develops links with Higher Education providers. As part of the 2009/10 *'Predict'* programme, folly hosted 4 new trainee posts through the Future Jobs Fund, for individuals aged between 18 and 24, all of which had been long term unemployed. In 2009 / 10, folly worked with 33 young person interns / volunteers under 24 years of age.

5. Storey Gallery - work with schools has always been an important part of the Storey Gallery programme. In 2009-10 it ran a project with schools across North West region in collaboration with two other galleries, Art Gene, in Barrow-in-Furness and Castlefield Gallery in Manchester. The aim of the project was to increase the use of contemporary art

in the classroom. Two freelance staff were appointed to co-ordinate the project and it involved 10 schools (primary and secondary) and 600 students.

4.9.2 Theme 2: Economy

The work of the LAP partners contributes to the strong cultural offer of the district and the region as a whole. The arts activity of the 7 partners helps to boost the district's economy, by raising its profile, stimulating creativity, innovation and learning, and encouraging participation. A more detailed analysis of the economic contribution the LAP partners make to the district, sub-regional and regional economy has been presented above.

4.9.3 Theme 3: Education, Skills and Opportunities

The LAP partners provide a wealth of education, skills and opportunities for people within the region. The partners promote learning opportunities for different age groups by engaging in literature, art, dance and music.

1. The Dukes - actively engages with primary and secondary schools, SEN schools and Further Education colleges in the district through targeted activities. In particular, the DT3 performance space at the Dukes presents a year-round programme of productions, and in 2009/10 engaged with 157 schools through outreach work. In addition, The Dukes offers individual placements for students, and training programmes, including a four tiered programme which provides young people with accredited AQA and Arts awards and structured traineeship, offering the opportunity of a route to full-time employment within the arts sector.

2. More Music - runs curriculum based workshops in nurseries, primary and secondary schools, special needs schools, Pupil Referral Units, colleges and Universities. It engages with all ages and abilities educating people on a number of issues and curriculum areas with clear learning objectives and outcomes. In addition the organisation has a national reputation for delivering CPD and training for musicians and teachers. This has included a 10 year programme of training weekends and days in Morecambe that brought hundreds of people to the resort to stay in hotels and B&B's and learn how to deliver workshops. This culminated in the publication of 'Community Music: A Handbook', in 2005, a definitive practical book that is still in print.

Most recently More Music created the regional Musicleader North West programme in partnership with GMAZ in Manchester and has worked with this organisation to promote networks, IAG's and the nationally accepted Code of Practice for Music Practitioners.

3. Live at LICA - sited on the campus of Lancaster University, Live at LICA delivers a wide range of professional training and development opportunities for graduates and early career artists. This includes a professional masterclass series, an annual international summer school, artist development bursaries and business development, and the Nuffield Emerging Artists Scheme (set to expand across artforms from 2011). In 2009-10, Live at LICA attendance for this support activity was 1,450, delivered by 46 artists. In addition, Live at LICA delivers artist-led projects that often deal with sensitive subjects, enabling local residents to create innovative artworks at the same time. Examples have included OAP, a project with Morecambe pensioners who worked with explicit cabaret artist Ursula Martinez on an informative show about ageing and sexuality; and The Future of Death, that enabled 40 local residents of all ages to explore issues around death, dying and bereavement. Total local resident participations for 2009-10 was 2,100. In addition, in 2009-10 Live at LICA presented 9 UK or World premieres; hosted 14 artists residencies; and commissioned 12 new performances, all of which toured nationally and/or internationally.

4. folly – a learning, inclusion, and self development are fundamental to the work of the digital arts organisation, folly. folly seeks to educate and engage people with arts through the use of digital technology, in particular those excluded by age, social class, family income or disability. folly has developed a digital participation programme to drive participation with digital art across the North West, targeted at the disadvantaged and digitally excluded (including the elderly). This includes the creation of 6 artist led projects, using art to motivate people to make best use of digital media and opportunities from online sources of art.

5. Litfest - runs a professional development programme to help writers to develop business skills and opportunities to enhance their career success. This includes writing workshops, development programmes coaching and pilot schemes.

Litfest also undertook a project in collaboration with the Offenders Learning and Skills Service (OLASS) called *'The View from My House'*. Litfest employed and trained writers and artists from Lancashire's prisons for creative writing works, leading to an exhibition and book publication. The finished work was delivered to the inmates and was also presented to the general public. The creative writing experience acts as a diversionary activity for the inmates, and also presents a learning opportunity, with the final piece of work creating a sense of achievement.

6. Storey Gallery - offers an education programme and participatory outreach projects that seek to encourage people of all ages to engage with art and artistic practice, so that they can develop their own understanding, creativity and reflective skills.

Storey Gallery has been running an acclaimed series of Talks on Art for the past several years. In 2009-10 they organised six talks by individual artists, curators, and academics from around the UK. The Gallery delivers guided tours to accompany each exhibition, plus recorded audio tours, and performance tours.

With FlyEric (a network with Castlefield Gallery, Manchester, and ArtGene, Barrow), and Lancashire Artists' Network, it organised three professional development symposia across the region entitled Changing Perceptions of what Artists can do. The event at Storey Gallery was called Opportunities for artists in the creative industries, and featured speakers from around the UK including four artists and one architect.

The Gallery has developed research collaborations with staff and students at Lancaster University in sociology, computing, volcanology, art, and design. It was featured as a case study in a report commissioned by Renaissance NW, Arts Council England NW, and the NW Universities Association, entitled Shared interest: developing collaboration, partnerships and research relationships between higher education, museums, galleries and visual arts organisations in the North West.

The Gallery takes on volunteers to assist with various aspects of programme delivery, and it ran structured placements for four students from Lancaster University and University of Cumbria. These activities provide training which is beneficial for student career development.

7. Ludus - Ludus Dance Development Department provides a programme of support for locally based professional dancers, and additional services and support for artists including training opportunities, access to facilities and placements. In addition, Ludus Dance Development regularly works with primary, secondary and SEN schools in the district, providing one-off sessions, projects and INSET training. Ludus works with the University of Cumbria to deliver INSET and provides high-level technique classes to students at Lancaster University

4.9.4 Theme 7: Valuing People

The communities within Lancashire are constantly changing and evolving, and include diverse populations. It is therefore important that the actions and activities of the LAP partners align with the needs of the changing demographics of the population to meet current and future needs.

1. folly - has drawn up a SMART Diversity Action Plan 2009-2012 which seeks to ensure that their operations include principles of equality, inclusion and diversity. The document embeds these principles across the organisational structure, procedures and artistic programme. folly also has a programme in place for safeguarding children, young people and vulnerable adults, providing clear guidance for staff on relevant issues.

2. Live at LICA - regularly undertakes major participatory projects with local residents, always launching a recruitment drive that involves giving short talks to encourage local people beyond their established audience, to take part in LICA's activity. Projects recognise the cultural diversity of the district, and target people that would not otherwise engage with LICA and its activities. As well as developing new artworks, this activity included the Nuffield Theatre's year-long programming project that saw artists and local residents programme the theatre for one year (that won an Arts Council award for innovation) and the Peter Scott Gallery's local curator project Conversations with the Collection that is seeing artists, young people and University support staff curate exhibitions.

3. Storey Gallery - has a Diversity Action Plan in place, and a policy on safeguarding children, young people, and vulnerable adults. The Gallery provides a variety of training for its staff and volunteers.

4. More Music – the USP for More Music is about working across the community and including everyone. This has developed programmes of work with the South Asian populations in Blackburn, Burnley, Accrington and Preston and with the Chinese community in Lancaster and Morecambe.

More Music's work with people with Special Needs has developed long term relationship with many institutions including Beaumont College, the Loyne School and Morecambe Road school. Most recently this extended countywide with a programme of music sessions for young people with disabilities that were held in libraries and other centres.

4.9.5 Summary

The organisations of the LAP provide a wide range of activities and events aimed at all people within Lancashire, regardless of age, race, ethnicity or gender. These broader impacts cultivate a strong community identity for the people of Lancaster and a recognisable brand to promote nationally and internationally. In particular, for activities that take place within the district, Ludus and More Music draw the majority of their audiences / participants from within the district, particularly regarding their teaching classes and workshops. However, their activities do spread to wider parts of the county and region, engaging with people in these areas too.

The analysis above demonstrates the wider impacts of the 7 LAP partners, particularly in relation to local policy contribution, with their activities aligning with the LDLSP Sustainable Community Strategy.

5 Overview of the primary research

5.1 Introduction

This section provides a summary of the key survey findings, with the full report attached at Annex 2.

5.1.1 Aims of the survey work undertaken

Information by Design (IbyD), on behalf of the Lancaster Arts Partners, carried out primary survey research over the period June to November 2010, to collect behavioural and expenditure data from audience members and/or users of each of the 7 RFO Lancaster Arts Partners in order to gather their perceptions on how they view arts activities in the district.

The specific objectives of the primary research undertaken have included:

- To conduct audience/beneficiary surveys and to collect robust data for each of the Lancaster Arts Partners;
- To provide an evidence base for the economic assessment; including the primary purpose of visit, origin of visitors, expenditure both on and off site, overnight stays generated and audience experience;
- To provide any additional information that would help identify the value of arts activity in Lancaster; and,
- To conduct a target total of 1,300 interviews using a mixed mode approach and appropriate sampling strategy for each partner.

5.1.2 Survey approach

The research objectives were met by using a multi-mode approach to conducting surveys, including face-to-face, online and telephone interviews. The target group for the research were attendees of arts events and venues in the Lancaster district, which included the combined audience for the Lancaster Arts Partners and those attending Council organised events in the district. The approach to undertaking surveys for each venue or event was largely determined by the availability of audience contact data (principally bookers' databases) and the type of information held by partners.

A questionnaire was developed to capture the key information required to meet the study objectives. A set of core questions was developed that could be used across all venues, and this was complemented by venue-specific questions in order to capture added value for each partner (see Annex 3 for the questionnaires). A variant of the questionnaire was also developed for class or workshop based venues in order to collect information among this type of 'audience'.

The questionnaire included questions on audience / visitor expenditure and experience, attendance, perceptions of the arts, and the wider impact of respondents' attendance and usage of other venues and facilities throughout the Lancaster district. The demographic data collected also included details of party composition by age and gender.

5.1.3 Sampling and data collection

The sample for each venue was governed by the available contact or booking data obtained from each of the partners. A telephone interview was undertaken where telephone details were available. In the absence of telephone numbers, or as a means to boost the sample, an invitation to participate in an online version of the survey was sent

to audience members, or a link to the survey set up on partners' websites. Where no contact data existed, face-to-face interviews were conducted (e.g. the Kite Festival).

Where the data allowed, a representative audience sample was interviewed for each venue/event according to respondents' geographical area of residence[7]. Quotas were applied during interviewing in order to obtain a representative sample, reflective of the area profile from the audience contact data for each venue/event. Small deviations from these quotas were corrected by weighting to the required proportions.

For the Dukes Theatre, in addition to respondents' geographical area of residence, the survey sample was also representative of the type of show (e.g. comedy, drama, Dukes own production, visiting production) and auditorium (the Rake Theatre, Rake Cinema, Williamson Park and the Round).

Table 5.1 below provides a summary of the approach and number of surveys completed as part of the primary research. In total 1,220 interviews were completed out of an original target set of 1,300. Table 5.1 provides the detail.

In some cases, samples were difficult to obtain and as such face-to-face or online surveys were used where possible (for example, Storey Gallery, folly and Nuffield theatre). However, given some difficulties in obtaining returns it was agreed that additional venues/events would be included (for example, Peter Pan in the Park, the Kite Festival and the mop-up survey of 200 from audience/booker databases made available by Lancaster City Council for the Platform and Dome).

Table 5.1: Primary Research Surveys undertaken

Venue/ event	Survey method	Target surveys	Returns achieved
The Dukes	Telephone survey	300	300
The Rake Theatre		*137*	*137*
The Rake Cinema		*30*	*30*
The Round		*72*	*73*
Williamson Park		*61*	*61*
Peter Pan in the Park	Telephone survey	-	101
Litfest	Online survey	150	62
Storey Gallery	Telephone and online survey	150	143
Lancaster University		200	252
Nuffield Theatre	Telephone and online survey		*50*
Concert series	Telephone survey		*202*
folly	Online/ telephone survey	100	49
Ludus Dance/More Music/DT3	Telephone survey	200	52
Kite Festival	Telephone and face-to-face	-	58
Mop up' survey (LCC Dome/Platform)	Telephone survey	200	203
TOTAL		**1,300**	**1,220**

[7] Postcode definitions applied to the sampling: Lancaster District (LA1-LA6); Rest of Lancashire (BB1-12, BD23, FY1-8, OL12-13, PR1-9, WN 6&8); Rest of North West (CA, M, L, LA7 and above, plus Cheshire); Out of region (other postcodes)

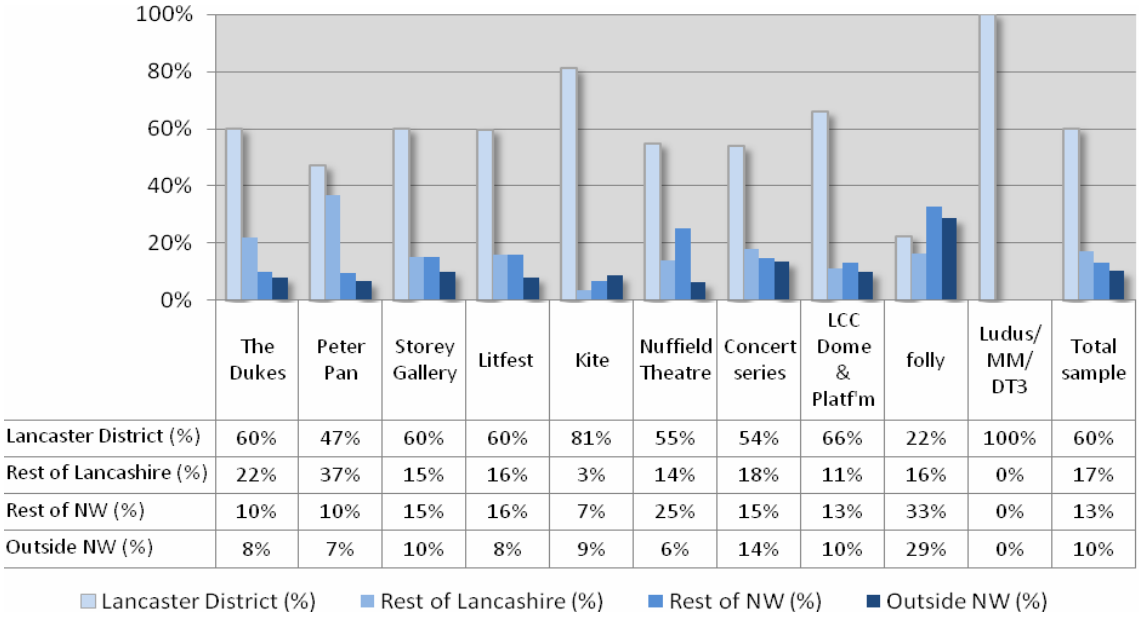
5.2 Respondent/Group profiles

The following section provides a brief profile of the 1,220 respondents who took part in the survey. In addition, an age and gender profile is provided of the overall group who attended the venues/events, based on a total of 3,747 attendees. This latter profile is a truer picture of the audiences for the arts in Lancaster district, as the respondent profiles only reflect the bookers of events or the contacts drawn from the Partners' databases.

5.2.1 Respondent profile

- *Gender* – of the 1,220 respondents 64% were female (781), and 36% male (439);
- *Ethnicity* – 96% of respondents were White British;
- *Age profile* – the majority of respondents (71%) were aged 45 years and over, comprising over 65 (25%), aged 45-54 (24%), and aged 55-64 (22%);
- *Geographic origin* - using postcode definitions, the profile of respondents identifies that the majority (60%) were from the Lancaster district, with 17% from the Rest of Lancashire, 13% from the Rest of the North West and the remaining 10% from outside the region. Table 5.2 provides a further breakdown by venue and event and shows that some venues and events, such as Peter Pan in the Park and folly, demonstrate appeal to wider audiences outside Lancaster district.

Table 5.2: Respondents by geographic area and venue (sample = 1,220)



	The Dukes	Peter Pan	Storey Gallery	Litfest	Kite	Nuffield Theatre	Concert series	LCC Dome & Platf'm	folly	Ludus/ MM/ DT3	Total sample
Lancaster District (%)	60%	47%	60%	60%	81%	55%	54%	66%	22%	100%	60%
Rest of Lancashire (%)	22%	37%	15%	16%	3%	14%	18%	11%	16%	0%	17%
Rest of NW (%)	10%	10%	15%	16%	7%	25%	15%	13%	33%	0%	13%
Outside NW (%)	8%	7%	10%	8%	9%	6%	14%	10%	29%	0%	10%

Note: In checks undertaken after the survey work was completed, the geography of the Peter Pan survey sample does not appear to be wholly consistent with the bookers' origin when analysed from the Dukes' booking records (given that the Dukes' summer performances in Williamson Park are known to draw the majority of their audience from outside of Lancaster District). Analysis of the booking details for the 2,880 people who booked a total 13,241 tickets for the Duke's Peter Pan performances shows a much wider audience geography of:

- 39% from Lancaster district;
- 32% from the rest of Lancashire;
- 24% from the rest of the North West; and
- 5% from outside the North West region.

- *Work status* – in relation to work status, 45% identified that they were either in full or part time employment with a further 9% self employed. Almost a third (32%) identified that they were retired; and,
- *Occupational group* – in terms of the occupation of the chief household earner (or previous occupation if retired), a high proportion (55%) described themselves as working in 'professional or senior management occupations'. This is relatively high when compared to equivalent SOC major groups 1 and 2 which currently suggest that 28% of the resident Lancashire population fall into these groups[8].

5.2.2 Group profiles

- *Party size* - respondents indicated an average party size of 3.5 people, with larger party sizes in venues/events with a family or young people appeal – Peter Pan, the Kite Festival and Nuffield Theatre;
- *Gender* – within a total of 3,747 people, 59% were female (2,210), and 41% male (1,537). This is a more balanced split compared with the respondents (bookers) profile;
- *Age profile* – whilst the overall profile across all venues showed that the group was typically composed of members aged 45 years and over (59% in total), this was a much lower proportion than the respondents' profile, with 21% aged 65 and over; 20% aged 45-54; and 18% aged 55-64. The proportion of young people in the overall group profile was much higher than in the respondents' profile, with 21% aged below 25, of which 11% were aged under 16. There was also variation in the age profile of party members by venue, with the Peter Pan event and the Kite Festival attracting higher proportions of under 16 year olds (both 23%) compared to the overall average (11%). The greater share of the audience for the Nuffield Theatre at Lancaster University were young people aged 16-24 (53%), reflecting the resident student population;
- *Average party size* – the average group size was 3.5 persons, with the average number of adults (3) and children (0.5). Among those with children, this number was closer to 2 children. Table 5.2 below provides a breakdown by venue/ event, identifying that the larger party sizes tend to be for outdoor events such as Peter Pan (5.7) and the Kite Festival (4.6).

Table 5.3: Average party size

	Average party size	Average no. of adults per party	Average no. of children per party
The Dukes	4.1	3.6	0.6
Peter Pan	5.7	4.3	1.4
Storey Gallery	2.9	2.7	0.2
Kite	4.6	3.4	1.2
Ludus/More Music	1.9	0.8	1.1
Litfest	2.4	2.3	0.0
Nuffield Theatre	4.3	4.3	0.1
Nuffield Concert series	2.8	2.7	0.1
Folly	2.4	2.1	0.3
LCC Dome & Platform audience	3.2	2.9	0.3
Overall Averages	**3.5**	**3.1**	**0.5**

[8] NOMIS (Apr 2009-Mar 2010) Occupational profile

5.3 Survey results

The following section provides a snapshot of the key survey findings from across each of the venues/events based on the 1,220 responses. The results for Ludus, More Music and DT3 are reported separately below due to the small sample sizes.

5.3.1 Reasons for visit

Table 5.4 below outlines the responses given for different reasons for the respondents visit on the occasion of their attendance.

Table 5.4: Reasons for visits

	The Dukes	Peter Pan	Storey Gallery	Kite	Litfest	Nuffield Theatre	Concert series	LCC Dome & Platform	folly	Total average
See a show / attend an event	96%	95%	81%	76%	50%	77%	95%	94%	80%	**85%**
Attend class or workshop	3%	0%	6%	0%	37%	13%	1%	1%	20%	**9%**
Shopping	2%	2%	9%	3%	13%	0%	0%	1%	0%	**3%**
Visiting friends	8%	2%	4%	16%	6%	4%	2%	2%	6%	**5%**
Going to a bar / restaurant	13%	1%	7%	7%	11%	3%	1%	2%	2%	**6%**
Going to or from work	1%	0%	5%	3%	18%	0%	1%	0%	8%	**3%**
Visiting as part of a holiday or short break	0%	0%	1%	7%	2%	0%	0%	3%	2%	**1%**
Staying locally with friends or relatives	2%	0%	4%	5%	2%	0%	1%	2%	0%	**2%**
As part of leisure / day trip	14%	7%	8%	26%	3%	6%	1%	6%	10%	**3%**
As part of business trip	1%	0%	3%	0%	5%	9%	0%	1%	6%	**2%**
As part of visit the university	2%	0%	2%	0%	8%	0%	1%	0%	0%	**1%**
Other	3%	10%	10%	7%	19%	20%	8%	4%	10%	**7%**

Multiple responses, ≠ 100%

- As shown in Table 5.4, on average 85% of respondents were in attendance to see the show or event, with the next main reason for the visit being to attend a class or workshop (9%);
- In terms of the **main reason for their visit,** an average of 85% identified that the show or event was the main reason, with 9% stating a class or workshop (37% in Litfest's case). 3% identified that they had visited primarily as part of a leisure or day trip, but just 1% as part of a holiday or short break;
- The data suggests relatively few 'linked-trips', where respondents combined their visit to the venue/event with other activities, such as going to bars and restaurants or shopping. However, there were differences by venue and event, with linked trips identified by 13% of those attending the Dukes and 11% at Litfest. Those attending Litfest were also more likely to combine their visit with their routine of going to or from work (18%) compared to the survey average (3%); and shopping (13% compared to 3% overall);

- In terms of **awareness of shows and events**, 36% of respondents identified that they had heard of the show by way of an event guide or leaflet, with 20% hearing of the show through word of mouth, and 16% reporting that they were regular visitors or had been before.

5.3.2 Number of visits (including frequency and future visits)

Table 5.5 below identifies the frequency of visits by respondents during the previous 12 months.

Table 5.5: Frequency of visits by venue (sample = 878)

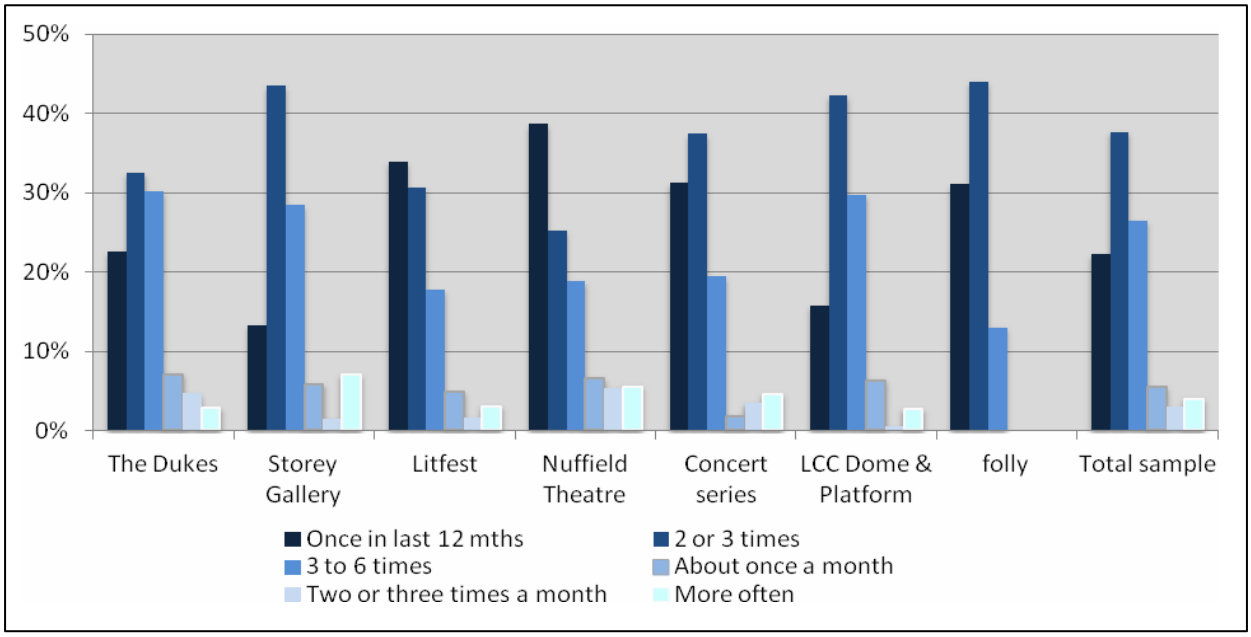


Table 5.5 above highlights the following key findings:

- Respondents identified that they are more likely to visit the venue on between 2 and 3 occasions during a 12 month period (37%), with a further 25% visiting 3 to 6 times in the same period; and,
- The frequency of visits also varies across venues/events, with respondents to LICA (Nuffield Theatre and the Concert Series) and Litfest more likely to be once during the 12 month period.

As shown in Annex 2, the survey also identifies that in terms of **first time visitors**, on average there were 15% of respondents attending a venue/event for the first time, with folly achieving 35%, Litfest 23% and the Nuffield Theatre 23% receiving the greatest shares of first time visitors. By contrast, the main venue with repeat visits is The Dukes Theatre (94%);

In relation to the **likelihood of visiting the venue or event again**, 76% of respondents indicated that they would be *very likely* to visit again, with a further 13% identifying they were quite likely to do so. There was some variation between venues, for example, 86% of those attending the Dukes identified they were *very likely* to visit again in the future.

5.3.3 Spend profile

Table 5.6 below provides analysis on spend by respondents (including those with no spend) for each of the venues and events (Ludus / More Music / DT3 and the Dome/Platform spend data is included in the total average), with a weighting applied for the gender profile of adults within the party.

This data has been used in the economic modelling to assess the benefits of off-site 'secondary' or indirect expenditure of people attending the LAP partners' arts activities.

Table 5.6: Expenditure per respondent

	The Dukes	Park (Peter Pan)	Storey gallery	Litfest	Nuffield theatre	Concert series	folly	Total average (incl. 'mop-up')
Food & drink inside venue	£5.37	£2.29	£3.09	£3.48	£2.42	£3.70	-	**£3.92**
Food & drink outside venue	£6.43	£2.33	£4.12	£6.67	£1.65	£1.75	£9.50	**£4.59**
Pub/bar drinking	£1.90	£0.58	£2.02	£3.60	£1.27	£1.34	£8.17	**£1.94**
Shopping	£0.96	£1.57	£5.82	£3.99	£0.24	£1.11	£5.88	**£2.67**
Travel, transport, parking	£3.74	£5.79	£3.96	£4.25	£3.18	£4.94	£11.88	**£4.55**
Child minder	£0.44	£0.34	£0.28	£0.82	£0.11	£0.67	£0.05	**£0.41**
Spending money (children)	£0.62	£0.38	£0.25	£0.37	£0.11	£0.21	£0.31	**£0.52**
Programmes/ Merchandise	£2.13	£2.77	£1.04	£6.19	£0.49	£1.64	-	**£2.08**
Proportion of respondents staying overnight	2%	5%	6%	-	8%	5%	20%	**6%**
Accommodation (overnight stays only)	£1.21	£1.83	£8.40	£2.32	£0.67	£1.98	£13.33	**£3.46**
Total average expenditure per respondent (£)	**£22.81**	**£17.86**	**£28.98**	**£31.71**	**£10.14**	**£17.34**	**£49.12**	**£24.14**

- As shown in Table 5.6, average spend per respondent was £24.14 with some variation across the venues. By spend category, respondents spent most on average *on food and drink outside the venue* (£4.59) and *travel, transport and parking* (£4.55).
- Respondents were asked **what they might have done instead** and how this might have impacted upon their spending behaviour. More than half of responses identified they would have stayed at home (56%); 12% identified they would go to something similar elsewhere, while 8% said they would go to the same event, show or venue but on a different day. Seven percent would have gone out for a drink or meal instead.
- 6% of the total sample **stayed in overnight accommodation**, which results in a relatively low overall average spend per respondent of £3.46. Those attending folly events were more likely to be out of district/region visitors and this is reflected in the higher proportion staying overnight (20%) and higher average spend on accommodation (£13.33). Although 8% of Nuffield theatre attendees stayed overnight, the majority spent very little, choosing to stay with friends and relatives rather than hotels or B&B's.

- Three quarters of those staying in overnight accommodation stayed in either Lancaster itself (50%) or Morecambe (25%).
- In terms of the 6% average staying overnight, a third of these respondents (34%) reported they had stayed with friends or relatives. Those staying in hotel accommodation comprised 25%, with 21% staying in a B&B or guesthouse.

5.3.4 Experience

Respondents were asked to consider their overall experience of the show, venue or event they attended. Table 5.5 below provides analysis of their experience on a scale of 0 to 10 (0 = very poor, 10 = excellent).

Table 5.7: Experience rating – mean score

Venue/event	Experience (mean score value)
Dukes	8.7
Storey Gallery	7.4
Nuffield Theatre	8.0
Nuffield concert Series	8.3
Peter Pan	8.2
Dome & Platform	8.6
Litfest	8.5
Kite Festival	8.1
Folly	8.0
Survey average (total sample)	**8.3**

- Table 5.7 identifies that the venues were rated highly overall with scores of between 7.4 (Storey Gallery) and 8.7 (the Dukes Theatre). Overall, 91% of respondent scores rated their experience between 7 and 10. The average mean score across all venues in the survey was 8.3.
- Respondents were also asked how far they agreed or disagreed with a number of statements relating to their experience at the venue or event they attended. Overall, 87% of the total sample 'agree' or 'agree strongly' that their experience was *high quality*, with 68% reporting that they would be *prepared to travel elsewhere in the North West* region for a similar activity. Almost half of the respondents (46%) had been encouraged to *go out to more arts activities* as a result of their visit, while 32% thought that they *would not have been able to do this activity anywhere else in the North West*.

The questionnaires gave respondents the opportunity to leave comments about their overall experience at the selected venue, asking them to explain their reasons for the scores identified above. A number of comments from respondents have been selected and are presented below:

- The Dukes
  - *10/10 – 'I really enjoy seeing films at the Dukes, and appreciate having the chance to see different styles of cinema in the region'.*

- 9/10 – *'The Dukes is one of the best things about Lancaster – there is a community feel about it. It is a real gem for Lancaster and we're lucky to have it'.*
- 10/10 - *'I live closer to Preston, but use the Dukes more because the seating is excellent and I prefer the shows put on. There is a good atmosphere at the Dukes, I really like the place'*

- Peter Pan
  - 10/10 – '*Very magical, children hadn't been to an open air theatre before. It was very good, the production was excellent. The play was good for all ages'*
  - 10/10 – *'Every year the production in the park is brilliant, it gets better and better. I have been going for 16 years!'*
- Storey Gallery
  - *'As a contemporary artist living in Lancaster, Storey Gallery is a life line, which provides a venue which supports and encourages engagement with current contemporary art'*
  - *'Great to see art and design in our home town and not to have to travel to London'*
  - *'Can't see art of this calibre anywhere else – its excellent, I enjoyed the variety'*
- Live at LICA
  - 10/10 – *'absolutely stunning performance, the type of event that draws people in'*
  - 10/10 – *'unusual, modern and something a bit different… you feel part of it as you are sat close to the play'*
  - 10/10 – *'good value for money, they put some different stuff on which I wouldn't be able to find locally, not even in Manchester'*
- Litfest
  - *'Lovely venue, well organised, and the writers and writing were at the centre of the experience'.*
  - *'International level speaker, good venue and facilities'*
  - *'Informative, pleasant evening, great for advice and networking opportunities'.*
- Folly
  - 10/10 – '*It was a superb, engaging, different and thoroughly rewarding experience*'
  - 10/10 – *'Challenging, thought provoking, bizarre, new experiences, new people'*
  - 8/10 – *'We had seen the company before. They are very imaginative and versatile in use of mixed media'*
- Ludus
  - 10/10 – *'the service and provision is excellent. It is a good experience and educational'*
  - 10/10 – *'venue is brilliant, staff very friendly and the course content is well thought out'*
  - 9/10 – *'lovely, fantastic atmosphere, very social and great for improving confidence'*

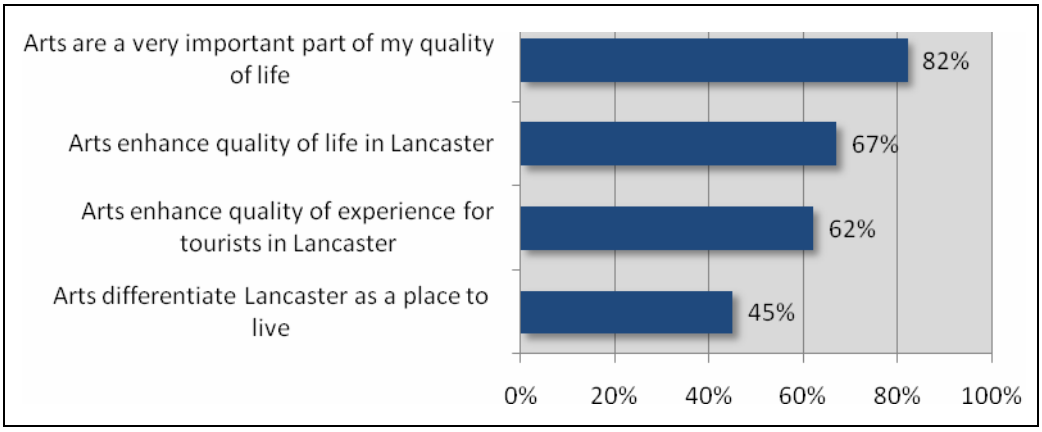
- More Music
  - 9/10 – *'lovely fantastic atmosphere, very social and great for improving confidence'*
  - 10/10 – *'I love the atmosphere, it's great for social interaction'*

The comments above indicate the success of the events that people have engaged with. They help highlight the diverse nature of activities the LAP Partners put on, and the different experiences and enjoyment people get out of them.

5.3.5 Image and perceptions of the arts

Respondents were asked to provide their perceptions of the arts in Lancaster district. Table 5.8 provides a summary of the survey responses.

Table 5.8: Image and perceptions of arts (sample = 1,220)

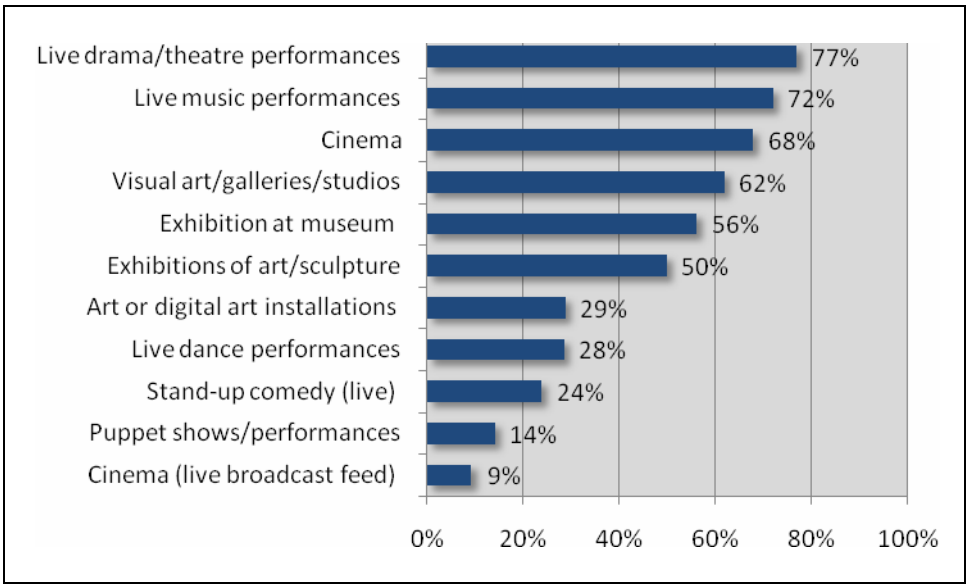


- Across all venues and events, 82% agreed ('agree' or 'agree strongly') that the arts were *a 'very important part of my quality of life'.* In total 71% thought that "*the quality of life in Lancaster is enhanced because of the range of arts activity across the district"* with 64% agreeing that *"the quality of experience for tourists in Lancaster District is enhanced because of the range of arts activity across the district '.* **Just under half (47%) thought that the range of arts activity available '*differentiates the Lancaster district as a place to live'*.**
- Respondents were asked which **organisations they thought supported arts activity** in Lancaster district. 75% identified that they thought the Arts Council supported arts activity; 72% identifying Lancaster City Council; and 55% identifying Lancashire County Council, and 33% identifying the Government more wildly;.
- Respondents were then informed that all these organisations contributed to the core funding of the arts in the district, and were asked their views on whether funding for the arts should be increased or decreased relative to current levels. Overall, 60% thought that the level of arts funding in the district should be increased (either 'slightly' or 'significantly') while only 2% thought it should be decreased.

5.3.6 Wider impacts

As set out in Table 5.9, the survey also sought to identify which other types of arts venues, events, facilities or shows respondents had attended in Lancaster district during the past 12 months.

Table 5.9: Art forms attended in the last 12 months (sample = 1,220)



- As shown in Table 5.9, live drama and theatre performances were the main art forms attended (77%), followed by live music performances (72%), cinema (68%) and visual arts/ galleries and studios (62%).
- In terms of location in which respondents had attended *any* of the different types of arts events, venues and facilities, 78% reported that they had attended venues and events in the Lancaster district, with 36% stating they had attended within the Lancashire County. The proportion who had attended venues or events elsewhere in the North West region (including Cumbria) and the rest of the UK, was 54% in both cases.
- Respondents were asked which particular venues or events they had attended in the Lancaster district in the last 12 months. In terms how these were classified, 63% indicated that they had attended performing arts venues and events; 35% live music; 35% visual arts, and 15% literature or poetry reading events.

5.3.7 Ludus/More Music/DT3

The following presents a summary of the findings for Ludus, More Music and DT3 based on a combined total of 52 survey responses (DT3 – 50%, Ludus – 35%, More Music – 15%), with total party size for those attending the venues totalling 95 (average party size being 1.9 persons – largely 1 adult and 1 child parties). The gender profile was 44 (85%) female, with 22 respondents from the 35-44 age group and all respondents from the Lancaster district.

A standard set of questions were used supplemented with additional questions aimed at the particular users, largely young people and their parents. The sample was an opportunity telephone survey using available names and contacts from the three venues.

- **Reasons for visit** – all respondents identified they were attending a class or workshop, with little evidence of a linked trip;

- **First-time and repeat visitors** - the number of first time visitors to the venues was 19 (36%). Of those who were more regular or repeat visitors, 29 had attended the venue once a week (88%). When asked to rate how likely they were to sign-up for another class, workshop or experience at the venue the majority said they were 'very' or 'quite likely' to do so. In all, 43 said they were *very likely* to sign-up again (83%) with a further 6 who thought that they were *quite likely* (12%);
- **Benefits experienced** - respondents were asked about the possible benefits they or their children might have experienced as a result of taking part in the classes/ workshops. The majority reported positive impacts in terms of *feelings of happiness and well-being* (79%) and *improved self confidence or self esteem* (77%). There were also health benefits, with 23 respondents experiencing *better health* (44%) and 21 respondents *better fitness* (40%). Only 3 respondents said they or their children had experienced none of these things. Other benefits were found to include socialisation and improved social skills, reported by 21 respondents (40%);
- **Spend** - average expenditure per respondent was £11.79. The average spend on shopping was £7.73 (in total, 23 respondents (44%) said they had spent money on shopping on the occasion of their visit). On average, respondents spent £1.24 on food and drink. In terms of how often they combined their visit with a meal-out or drink (before, during or after attending the venue), 23 respondents in total (44%) said they did so to some extent;
- **What would you have done instead** - 37 of the 52 respondents (71%) said they would have stayed at home; 10 said they would go to something similar elsewhere, while 8 said they would have visited friends instead. Compared to the amount spent at the venue, 35 respondents (67%) estimated that they would have spent nothing at all on this alternative, with most of the remaining respondents reporting that their spend would have stayed at about the same level (23%);
- **Experience** - respondents' rating of their experience at Ludus/More Music and DT3, on a scale of 1 to 10 showed a high mean score average of 9.1, backed by many positive comments about the atmosphere at the venue and their overall experience.

  Of the total of 52 respondents, 27 gave a maximum score of 10. Respondents were also asked how far they agreed or disagreed with a number of statements relating to their experience at the venue or event they attended. Overall, 41 of the 52 respondents (79%) agreed ('agree' or 'agree strongly') that their experience was *high quality*, with 29 reporting that they had been encouraged to *go out to more arts activities* as a result of their visit. In total, 20 respondents said they would be *prepared to travel elsewhere in the North West* region for a similar activity, followed by 11 who thought that they would *not have been able to do this activity anywhere else in the North West;* that the offer was unique to the district.

6 Economic value of Arts activity in Lancaster District (the LAP partners and wider activity)

6.1 Introduction

There is a growing recognition of the role of cultural assets in place making and the overall economic well-being of an area. This section sets out the results of the assessment of economic value of activity of the LAP partners in Lancaster as well as an assessment of the wider contribution of arts to the district's economy.

This study has developed an economic input-output model to capture the direct and indirect economic impacts of the LAP partners' activities. A wider GVA (Gross Value Added) assessment has also been made based upon the mapping exercise outlined in section 3.

Each LAP partner has provided detailed employment, financial and visitor information for their individual venues. The modelling in part is also underpinned by key assumptions for off-site visitor expenditure which have stemmed from the primary research survey work undertaken by IbyD. The sub-sections below present an assessment of the gross and net additional jobs of the LAP partners' arts activities, adjusting for additionality factors. These quantitative impacts for each venue have been mapped out in spreadsheet format to show the economic input-output relationships and are presented as a 2009/10 financial year 'snapshot' in the relevant sections below, with detail provided for each of the last five years where this has been obtainable. More detailed versions of the impact models are included in Annex 4.

6.2 Approach to the economic assessment

The core quantifiable economic impacts have been based on an assessment of the 'on' and 'off site' expenditure impacts of the activity of the seven partners. The assessment examines a number of key elements that provide an estimate of the direct, indirect and induced economic impact.

This economic assessment has looked at measuring:

1. **Direct economic impact:** on site income, expenditure and employment drawn from the operational accounts of each of the venues;
2. **Indirect supply chain jobs supported:** based upon the expenditure of the seven partners with their suppliers. This information has been gathered from the operational accounts of each partner with estimates made of the extent to which suppliers are located within Lancaster district, sub-region, region or out of region (through a combination of venue supplier addresses and partners' bets judgement);
3. **Indirect impact – jobs supported by audience secondary expenditure:** relates to expenditure by visitors to each of the venues off-site (including transport, hotels, restaurants). This has been assessed through the visitor expenditure surveys and examines the amount of expenditure per person and the spend across key expenditure categories; and,
4. **The overall value of arts activity across Lancaster District (GVA contribution):** this provides an estimate of the overall value of arts activity across the Lancaster district based upon the bottom-up assessment of arts organisations across Lancaster.

This analysis will be segmented at four spatial levels (Lancaster District, rest of Lancashire, rest of North West, and outside North West). This provides a net economic

impact value of the Arts and estimates of employment, expenditure and Gross Value Added.

6.3 Direct Impacts

6.3.1 Workers directly employed through the LAP partners

A detailed analysis of the direct employment of the 7 LAP partners has been undertaken, profiled across 5 years from 2005/6 - 2009/10. The 7 LAP partners currently (09/10) directly employ a total of 78 full time equivalents (FTE's), comprising a mixture of core staff and casual staff. The table below sets out the FTE's profiled over the last five years for each of the seven venues:

Table 6.1: Direct Economic Impact (gross and net additional jobs)

	Dukes	Ludus	More Music	Litfest	Storey Gallery	Lancaster University	folly	Total
Gross Jobs								
2005/2006	27	17	11	2	2	11	8	78
2006/2007	26	16	12	3	3	11	9	80
2007/2008	24	15	12	3	3	11	8	76
2008/2009	26	15	12	3	3	10	8	77
2009/2010	29	13	13	2	4	9	8	78
Additionality on 2009/2010 (district level)								
Leakage	8%	1%	4%	0%	0%	33%	45%	-
Displacement	0%	0%	0%	0%	0%	0%	0%	-
Multiplier	1.36	1.36	1.36	1.36	1.36	1.36	1.36	-
Deadweight	0%	0%	0%	0%	0%	0%	0%	-
Net additional jobs	**36.3**	**18.0**	**17.0**	**3.1**	**4.8**	**8.1**	**6.0**	**93.2**

There has been little change in FTE's across all of the partners, with employment numbers remaining relatively constant across the last five years – perhaps with the exception of the Dukes in 2007/08 when two positions were lost with the reduction of ACE core funding, and recent loss of a couple of jobs at Ludus.

The gross FTE figures have been adjusted taking into consideration the additionality factors of leakage (based on employee home address information supplied by the LAP partners) and the application of a multiplier factor of 1.36[9]. Using these adjustments, we estimate that net direct employment impacts could be up to 93 jobs and GVA contribution of £3.31m as shown in table 6.2.

[9] Jobs supported under the Deadweight scenario (i.e. the position without core funding support) are considered to be zero, given that the partners have confirmed that under a scenario where core funding is withdrawn, the result would be closure of any buildings' based operations. Arts sector jobs assumed to be not displacing other activity, therefore displacement factors also considered to be zero. Multiplier factor drawn from English Partnerships' Additionality Guide (2008)

Table 6.2: Net additional employment Impact 2009-2010 (after additionality adjustments)								
Arts Partners as employer	The Dukes	Ludus	More Music	Litfest	Storey Gallery	Lancaster University	folly	**Total**
Net additional jobs (after additionality)	36.3 jobs	18.0 jobs	17.0 jobs	3.1 jobs	4.8 jobs	8.1 jobs	6.0 jobs	**93.2 jobs**
GVA contribution from the net additional jobs	£1.29m	£0.64m	£0.6m	£0.11m	£0.17m	£0.29m	£0.21m	**£3.31m**

6.4 Indirect Impacts

6.4.1 LAP partners as purchasers

The 7 LAP partners purchase goods / require services from local, regional and national companies. The indirect expenditure impacts created through the supply chain expenditure have been analysed from the management accounts provided by each of the 7 LAP partners, and have been broken down by type of spend (e.g. catering / marketing / equipment etc), and profiled over 5 years.

Table 6.3 sets out the 7 LAP partners' expenditure for 2009/10 for the major categories of expenditure:

Table 6.3: LAP partners' supply chain expenditures (gross figures for 2009/10)								
	The Dukes	Ludus	More Music	Litfest	Storey Gallery	LICA	folly	Total
Expenditure								
Artists	£225,066	£22,881	£252,342	£17,065	£20,087	£150,000	0	£687,441
Marketing	£80,794	£7,161	£7,699	£8,661	£9,406	£20,500	£793	£135,014
Catering supplies	£52,233	0	£6,252	£1,727	0	£12,000	0	£72,212
Office supplies	£9,298	£5,326	£45,000	£501	£2,522	£3,500	0	£66,147
Other Admin & Overheads	£62,391	£39,944	0	£9,739	£5,118	£8,620	£21,491	£147,303
Accommodation (e.g. rents, rates & utilities)	£126,938	£39,007	£14,451	£5,102	£15,578	0	0	£201,076
Equipment / technical services	£20,629	£2,358	£11,000	0	£4,671	£17,000	£6,478	£62,136
Transport / Travel	£5,581	£45,847	£20,795	£1,818	£1,794	£2,900	0	£78,735
Other (including production / exhibition costs)	£267,021	£35,792	£18,945	0	£20,039	£6,500	£73,179	£421,476
Total expenditure	**£849,951**	**£198,316**	**£376,484**	**£44,613**	**£79,215**	**£221,020**	**£101,941**	**£1,871,540**

Table 6.3 shows that the Dukes' expenditure is highest of all the LAP partners accounting for 45% of the total of £1.87m, followed by More Music (20%). Highest individual category expenditure across the LAP partners was for Artists (36.7%), followed by 'other' (22.5%). Most partners' expenditure could be grouped under the category headings, but for those that were less common, they were placed into 'other'. 'Other' expenditure

includes production and programming costs and was grouped due to the varying nature of activities.

For the purpose of this analysis, we also asked each LAP partner to provide their best judgement on the proportions of their expenditure during 2009/10 spent across four geographic areas: 1) Lancaster; 2) rest of Lancashire; 3) rest of North West; 4) outside of NW. The 2009/10 supply chain proportions have then been used to calculate the LAP partners' supply chain expenditure across each of the last five years[10].

Table 6.4: LA partners - Supply chain expenditure – gross expenditure (2009/10 support) by geography

	The Dukes	Ludus	More Music	Litfest	Storey Gallery	Lancaster University	folly	**Total**
Gross jobs								
1. Total expenditure Lancaster	£336,388	£90,464	£283,006	£24,572	£48,651	£78,856	£13,303	**£875,240**
2. Total expenditure rest of Lancashire	£102,120	£11,682	£60,388	£1,953	£251	£26,180	£1,021	**£203,596**
3. Total expenditure rest of NW	£113,146	£17,230	£22,997	£7,860	£18,154	£48,980	£66,494	**£294,860**
4. Total expenditure outside of NW	£298,297	£78,940	£10,094	£10,227	£12,159	£67,004	£21,123	**£497,844**
Gross jobs conversion (£40,000/job)	£40,000	£40,000	£40,000	£40,000	£40,000	£40,000	£40,000	**-**
Lancaster (gross jobs)	8.4	2.3	7.1	0.6	1.2	2.0	0.3	**21.9**
Rest of Lancashire (gross jobs)	2.6	0.3	1.5	0.0	0.0	0.7	0.0	**5.1**
Rest of NW (gross jobs)	2.8	0.4	0.6	0.2	0.5	1.2	1.7	**7.4**
Outside NW (gross jobs)	7.5	2.0	0.3	0.3	0.3	1.7	0.5	**12.4**
Sub total gross jobs	**21.2**	**5.0**	**9.4**	**1.1**	**2.0**	**5.5**	**2.5**	**46.8 jobs**
Additionality adjustment (district level)								
Leakage	15%	15%	15%	15%	15%	15%	15%	-
Displacement	0%	0%	0%	0%	0%	0%	0%	-
Multiplier	1.36	1.36	1.36	1.36	1.36	1.36	1.36	-
Total net additional jobs	**24.6**	**5.7**	**10.9**	**1.3**	**2.3**	**6.4**	**2.9**	**54.1 jobs**
GVA contribution from the net additional jobs	**£0.98m**	**£0.23m**	**£0.44m**	**£0.05m**	**£0.09m**	**£0.26m**	**£0.12m**	**£2.16m**

Note: a more detailed spreadsheet analysis of the supply chain can be found in Annex 3.

[10] Caveat - the 2009/10 supply chain percentages have been supplied by the LAP partners as estimations of their supply chain use. Figures for previous years were not used as these were not recorded by all LAP partners, and therefore estimations of these figures would have become increasingly unreliable. The use of 2009/10 proportions however, may not identify changes in activity that occurred over previous years, for example, Storey Gallery did not have its gallery space in 2008 during the refurbishment of the Storey Institute building to create the Storey Creative Industries Centre.

Table 6.4 above sets out a snapshot of the 2009/2010 supply chain expenditure for all 7 LAP partners, and also presents gross and net job calculations supported by this expenditure. Gross jobs have been calculated using the ratio of £40,000 of expenditure to support 1 gross job.

Table 6.4 shows that across all the LAP partners, the greatest proportion of supply chain expenditure occurs within Lancaster district – totalling c. £875,000 in 2009/10. The expenditure by the LAP partners therefore makes an important contributes to the local economy, supporting local jobs and local people. The Dukes expenditure is the greatest, and therefore it also contributes the most to the gross / net job figures (21.2 gross jobs and 24.6 net additional jobs respectively). It is also worth highlighting the contribution of More Music to the local economy through its supply chain, as 75% of its expenditure is in Lancaster, creating 7 gross jobs within the district.

This year, total LAP partner expenditure has created 46.8 (gross) and 54.1 (net) indirect jobs, which includes 34.3 jobs within the North West, of which 21.9 are within Lancaster district.

6.4.2 Revenue and jobs generated off-site through attender spend

Each event at the venues creates additional expenditure, some of which is captured directly within the venues (e.g. merchandise / refreshments etc which contributes directly to partner on-site employment), and some will occur off site. The expenditure by attenders off-site (including for example, transport, hotels, restaurants etc) contributes to the local economy and is a further category of indirect economic impact which can be attributed to the activities of the LAP partners.

Average attender expenditure has been assessed from the responses captured through the primary research work (see table 5.4), examining the amount of expenditure per attender and the allocation across the main expenditure categories and then multiplied through by the total audience for each partner. The results from this are presented in table 6.5, and from this analysis, the gross and net employment created has been calculated, and is set out in table 6.6.

Table 6.5: Total Attender off-site expenditure – model projection estimates (2009/10)

	Lancaster	Rest of Lancashire	Rest of North West	Outside of North West	Attender Spend (total)
The Dukes	£535,406	£285,892	£338,070	£149,284	£1,308,651
Ludus	£157,226	£0	£0	£0	£157,226
More Music	£413,637	£0	£0	£0	£413,637
Litfest	£24,183	£9,900	£5,501	£7,110	£46,694
Storey Gallery	£51,338	£59,907	£41,977	£35,599	£188,822
LICA	£110,220	£32,987	£48,100	£70,907	£262,215
Folly	£13,684	£8,048	£34,775	£36,944	£93,451
Total	**£1,305,695**	**£396,734**	**£468,423**	**£299,844**	**£2,470,696**

Note: as a general rule, on-site spend is already accounted for in the Partner's on-site direct jobs (e.g. catering staff), with the exception of Litfest and Storey Gallery, where on-site expenditure reported by attenders has been modelled given that this supports additional employment within the Storey Creative Industries Centre, which are not counted within Litfest's or Storey Gallery's direct staffing.

Table 6.5 above indicates that the output model projects total attender off-site expenditure across the 7 LAP partners at £2,470,696 for 2009/10. The highest proportion

of this is from the Dukes attender off-site expenditure (£1,308,651), which accounts for 53% of the total. This is expected given that it is the largest venue and has the highest proportion of income.

Table 6.6 overleaf sets out the gross and net additional employment figures for each venue across Lancaster, the rest of Lancashire, the rest of the North West and outside the North West based on the off-site expenditure set out above, divided by a figure of £40,000 per job. The table outlines that:

- 51 indirect net additional; jobs have been created in the local economy by audience expenditure outside the LAP partner venues, but associated with their visits to partner activities;
- 88% (45) are within the North West region, of which:
  - 53% (40.2) are within Lancaster district.
  - The audience at the Dukes contributes most to this figure, with their audience spend contributing to 46% of the total attender spend indirect net jobs.

Table 6.6: Attender off-site expenditure impact – Gross and net employment calculations

	Lancaster	Rest of Lancashire	Rest NW	Outside NW	Total
Gross Indirect Employment (Jobs)					
The Dukes	13.4	7.1	8.5	3.7	32.7
Ludus	3.9	0.0	0.0	0.0	3.9
More Music	10.3	0.0	0.0	0.0	10.3
Litfest	0.6	0.2	0.1	0.2	1.2
Storey Gallery	1.3	1.5	1.0	0.9	4.7
Live at LICA	2.8	0.8	1.2	1.8	6.6
Folly	0.2	0.1	0.6	0.6	1.5[11]
Gross jobs	**32.5**	**9.8**	**11.4**	**7.2**	**60.9**
Additionality on 09/10					
Leakage	15%	15%	15%	15%	15%
Displacement	27%	27%	27%	27%	27%
Multiplier	1.36	1.36	1.36	1.36	1.36
Total net additional jobs	**27.4**	**8.3**	**9.6**	**6.1**	**51.4**

A more detailed audience spend impact table is attached in Annex 5.

[11] It has not proved possible to identify with accuracy the number of people in folly's visitor audience due to their high web-based audience (185,012 in 2009/10), and therefore the indirect attender off-site spend for folly has not been possible to capture to its full extent. We have however, used the known figures for folly of workshop attenders figure in the model (342 in 2009/10).

6.4.3 Arts as a promotional asset for Lancaster – Equivalent Advertising Value

The value of arts and cultural assets in helping to promote an area is generally recognised as an important part of the benefits that flow from investment support to the sector.

The value to the public sector of the image and promotional benefits generated can be monetised based upon an assessment of the media value to the local area generated by media interest in the LAP partners' activities. The usual approach for this is an assessment of 'Equivalent Advertising Value' of press and broadcast coverage generated – i.e. the price that would otherwise have to be paid to purchasing advertising to achieve a similar level of coverage.

The LAP partners have assisted this process by reviewing the number of broadcasts, articles that have been written by local, regional and national media. Given that the real promotional value to the district lies in coverage generated beyond the district boundary, local media coverage (which is not insignificant within the district) has been excluded from the analysis.

Table 6.7 overleaf has been compiled from data provided by four of the seven LAP partners, and suggests a monetary economic value of c. £830,000 p.a.

Examples of coverage generated include:

- *For the Dukes:*
  - Broadcast TV - The Bubble (BBC 2), North West Tonight
  - Broadcast Radio - BBC Radio Lancashire, Diversity FM
  - Consumer - Lancashire Life, Lancashire Magazine
  - National Press - The Guardian Guide (previews), The Guardian (review), The Observer (review)
  - Regional Press - mostly, Lancaster Guardian, Morecambe Visitor, Westmorland Gazette, Lancashire Evening Post
  - Trade Press - The Stage
- *For Ludus Dance:*
  - Regional press - Lancashire Evening Post, Lancaster Guardian, Morecambe Visitor
  - National dance website
  - Trade press - The Stage
- *For Storey Gallery:*
  - Broadcast radio - BBC Radio Lancashire
  - National press – Arts Council England – OwnArt Bulletin & Visual Arts Blueprint, The Guardian Guide, a-n magazine
  - Online – The Guardian, Art World Magazine, a-n Interface

Table 6.7: LAP partners' promotional image value (2009/10 media interest generated)

Media items 2009/10	The Dukes	Storey Gallery	Ludus	More Music	Litfest	folly	LICA	TOTAL	EAV value per item for LAP*	LAP estimate
Broadcast - TV (national)	1	-	-	-	Data not made available			1	£15,000	£15,000
Broadcast - TV (regional)	1	-	-	2				3	£7,500	£22,500
Broadcast – radio (regional)	14	4	2	1			4 (1 national)	21	£3,750	£93,750
Consumer press (regional)	3	-	-					3	£1,250	£3,750
National press	6	4	-	1			19	11	£7,500	£225,000
Regional press	101	2	2	20				125	£3,750	£468,750
Trade press (national)	3	-	2	2				7	£300	£2,100
Trade press (regional)	-	-	-	1			2	1	£150	£450
Total volume	**129**	**10**	**6**	**27**			**25**	**171**		**£831,300**

* Note 1: GENECON judgement based upon previous studies undertaken for Turner Contemporary, Lowther Castle & Gardens and the Everyman Theatre, Liverpool utilising data from Midnight Communications and Cision.

Note 2: The above figures do not include online articles on media websites, social media figures or email bulletin figures.

Note 3: Local press articles/coverage deliberately excluded from the analysis.

6.4.4 Summary of LAP partner's economic impact

Table 6.8 below brings together the net additional revenues generated by the seven LAP partners, calculated for the sub-regional economy after appropriate adjustments for leakage (i.e. revenue and jobs benefit taken by those living outside the sub-region); displacement (revenue and jobs displaced by the partners' activities), and multiplier effects.

Table 6.8 shows a net additional economic contribution of £7.56m for the 2009/10 financial year.

Table 6.8: Summary - Net additional revenues generated for the sub-regional economy 2009-2010 (Net economic contribution)

		The Dukes	Ludus	More Music	Litfest	Storey Gallery	Live at LICA	folly	**Total**
Direct	Arts Partners as employer (GVA value)	£1.29m	£0.64m	£0.6m	£0.11m	£0.17m	£0.29m	£0.21m	**£3.31m**
Indirect	Arts Partners as purchaser (supply chain spend after accounting for leakage (15%), displacement (nil) and multiplier 1.36)	£0.98m	£0.22m	£0.44m	£0.05m	£0.91m	£0.26m	£0.011m	**£2.16m**
Indirect	Attender spending (secondary spend by audiences after accounting for leakage (15%), displacement (27%) and multiplier 1.36)	£1.1m	£0.16m	£0.35m	£0.04m	£0.16m	£0.22m	£0.08m	**£2.08m**
TOTALS		**£3.375m**	**£1.002m**	**£1.39m**	**£0.2m**	**£0.42m**	**£0.76m**	**£0.41m**	**£7.56m**

Table 6.9 summarises the net additional job impacts for the 2009/10 financial year, outlining that the LAP partners' activities contribute 198 net additional jobs to the Lancaster sub-regional economy.

Table 6.9: Summary - Employment Impact 2009/10 (net additional jobs after additionality adjustments)

		The Dukes	Ludus	More Music	Litfest	Storey Gallery	Live at LICA	folly	**Total**
Direct	Arts Partners as employer	36	18	17	3	5	8	6	**93**
Indirect	Arts Partners as purchaser	25	6	11	1	2	6	3	**54**
Indirect	Attender spending	28	3	9	1	4	6	1	**51**
Total net additional jobs		**89 jobs**	**27 jobs**	**37 jobs**	**5 jobs**	**11 jobs**	**20 jobs**	**10 jobs**	**199 jobs**

6.4.5 Geography of LAP partners' economic impact

An estimate of the LAP partners' economic impact across the different spatial geographies of Lancaster; rest of Lancashire; rest of North West region; and Outside the North West region can be made from the gross input figures upon which the economic model has been built. The table below has been extracted from the model, and combines the partners' expenditures during the 2009/10 financial year on 1) staff costs (split by employee postcode analysis); 2) supply chain (partners' judgement), and 3) audience secondary expenditures, assumed all spent in Lancaster.

The table shows:

- Total of £6m spend (gross figures, i.e. before additionality adjustments);
- 79.6% spent in Lancaster district;
- Further 5.2% spent in the rest of Lancashire, i.e. total 84.8% spent in Lancashire;
- 6.9% spent in the rest of the North West Region; and
- 8.3% spent outside the North West region.

Table 6.10 – Geography of the LAP partners' economic impact

SUMMARY OF LAP PARTNERS' EXPENDITURE ON STAFF, SUPPLY CHAIN AND AUDIENCE SECONDARY EXPENDITURE					
LAP Partners' expenditure on Staff					
		Staff home origins			
	Direct Staff costs	**Lancaster**	**Rest of Lancashire**	**Rest of NW Region**	**Outside region**
Dukes	£618,926	92%	2%	6%	0%
Ludus	£338,967	99%	0%	1%	0%
More Music	£200,643	96%		4%	0%
Litfest	£55,194	100%	0%	0%	0%
Storey Gallery	£84,562	100%	0%	0%	0%
LICA	£302,000	67%	33%	0%	0%
folly	£175,598	55%	9%	36%	0%
	Averages	87%	6%	7%	0%
Sub-Totals Direct staff costs	**£1,775,890**	**£1,542,856**	**£112,619**	**£120,161**	**£0**
LAP Partners' expenditure on supply chain					
	Supply Chain costs	**Lancaster**	**Rest of Lancashire**	**Rest of NW Region**	**Outside region**
Dukes	£849,951	336,388	102,120	113,146	298,297
Ludus	£198,316	£90,464	£11,682	£17,230	£78,940
More Music	£376,484	£283,006	£60,388	£22,997	£10,094
Litfest	£44,613	£24,572	£1,953	£7,860	£10,227
Storey Gallery	£79,215	£48,651	£251	£18,154	£12,159
LICA	£221,020	£78,856	£26,180	£48,980	£67,004
folly	£101,941	£13,303	£1,021	£66,494	£21,123
	Averages				
Sub-Totals supply chain	**£1,871,540**	**£875,240**	**£203,596**	**£294,860**	**£497,844**
TOTAL LAP Partners' expenditure on Staff and supply chain	**£3,647,430**	**£2,418,096**	**£316,215**	**£415,021**	**£497,844**
	TOTAL SPENT	SPENT IN LANCASTER	SPENT IN REST OF LANCASHIRE	SPENT IN REST OF NW REGION	SPENT OUTSIDE NW
Audience secondary expenditure					
Dukes	£1,308,651	£1,308,651			
Ludus	£157,226	£157,226			
More Music	£413,637	£413,637			
Litfest	£46,694	£46,694			
Storey Gallery	£188,822	£188,822			
LICA	£262,215	£262,215			
folly	£93,451	£93,451			
Sub-Totals supply chain	**£2,377,245**	**£2,377,245 Assume all spent in Lancaster district**			
TOTAL LAP Partners' spend + audience spend	**£6,024,675** TOTAL SPENT	**£4,795,341** SPENT IN LANCASTER 79.6%	**£316,215** SPENT IN REST OF LANCASHIRE 5.2%	**£415,021** SPENT IN REST OF NW REGION 6.9%	**£497,844** SPENT OUTSIDE NW 8.3%

6.5 Return on investment

A return on investment calculation is based on a GVA estimate derived from the level of net additional jobs created against the investment that has been made. This is also known as the benefit to cost ratio. In this case, it can also be calculated for each LAP Partner from the net economic contribution summarised in table 6.8 divided by the level of funding support received.

Table 6.11 below sets out a summary of results, and indicates that the 7 LAP partners' return on total investment is 5.19:1. This is significantly above the PwC benchmark[12] of 1.6:1 ratio for return on investment for image, events and tourism projects which are likely to be a mix of both capital and revenue supported projects. An alternative benchmark comparator from the PwC work is the RDA investment channelled into business support projects which are more likely to have taken the form of revenue rather than capital support, and these show an achieved annual GVA return of 2.8:1.

In summary, the economic value of the 7 LAP Partners effort out-performs two national comparator benchmarks:

RoI ratio benchmark	**RoI ratio**
RDA supported Image events and tourism projects	1.6:1
RDA business support projects	2.8:1
LAP 7 Partners	**5.19:1**

The analysis also highlights that individually, the LAP partners return on total investment ranges from 2.0:1 (Litfest) and 37.1:1 (More Music), meaning that all LAP partners are also achieving returns on investment significantly beyond the PwC benchmark for image events and tourism projects.

If the argument is accepted that total safe-guarded jobs are not apportioned between each funder, but that each funders' investment contribution is critical for supporting the whole of each LAP organisation's output, then the table indicates even higher levels of return against the individual funder contributions. It is accepted however that this may be a more controversial method of presenting the analysis.

Table 6.11: Summary of LAP Partners Return on Core Funding Investment (2009 /10)

		ACE	Lancashire County Council	Lancaster City Council	**Total – All funders**
The Dukes	Total Investment (£'s)	£267,738	£179,514	£147,600	**£594,852**
	Annual Economic contribution (£'s)	£3,375,942,	£3,375,942,	£3,375,942,	**£3,375,942,**
	Project RoI	12.6	18.8	22.9	**5.7**
Ludus	Total Investment (£'s)	£295,324	£29,426	£21,850	**£346,600**
	Annual Economic contribution (£'s)	£1,002,885	£1,002,885	£1,002,885	**£1,002,885**
	Project RoI	3.4	34.1	45.9	**2.9**

[12] DBERR appointed PWC to assess the *'Impact of RDA spending – National report,'* March 2009.

Table 6.11: Summary of LAP Partners Return on Core Funding Investment (2009 /10) cont'd

		ACE	Lancashire County Council	Lancaster City Council	**Total – All funders**
More Music	Total Investment (£'s)	£67,166	£27,810	£10,000	**£104,976**
	Annual Economic contribution (£'s)	£1,387,251	£1,387,251	£1,387,251	**£1,387,251**
	Project RoI	20.7	49.9	138.	**13.2**
Litfest	Total Investment (£'s)	£67,166	£18,475	£9,100	**£94,741**
	Annual Economic contribution (£'s)	£202,102	£202,102	£202,102	**£202,102**
	Project RoI	3.0	10.9	22.2	**2.1**
Storey Gallery	Total Investment (£'s)	£32,591	£0	£35,100	**£67,691**
	Annual Economic contribution (£'s)	£420,019	£420,019	£420,019	**£420,019**
	Project RoI	12.9	-	12.0	**6.2**
Live at LICA	Total Investment (£'s)	£97,082	£0	£500	**£97,582**
	Annual Economic contribution (£'s)	£763,770	£763,770	£763,770	**£763,770**
	Project RoI	7.9	-	-	**7.8**
folly	Total Investment (£'s)	£149,772	£0	£0	**£149,772**
	Annual Economic contribution (£'s)	£409,293	£409,293	£409,293	**£409,293**
	Project RoI	2.7	-	-	**2.7**
Total	***Total Investment (£'s)***	***£976839***	***£255,225***	***£224,150***	***£1,456,214***
	Total net additional jobs created/safeguarded	***199***	***199***	***199***	***199***
	Annual Economic contribution (£'s)	***£7,561,202***	***£7,561,202***	***£7,561,202***	***£7,561,202***
	Project RoI	***£7.74***	***£29.63***	***£33.73***	***£5.19***

6.6 The wider economic value of arts activity in Lancaster district

The preceding analysis has shown an economic contribution of c. £7.5m p.a to the sub-regional economy from the seven LAP partners. The analysis of the overall scale of arts activity in Lancaster presented in section 3 however showed that the LAP partners are just part of a much larger cluster of arts activity that has built up over the last thirty years in Lancaster district.

The analysis presented in section 3 covered three methods of analysis – from published data sources through to a bottom up 'Google search' supplemented by local knowledge of the LAP partners (including liaison with the economic development team at Lancaster City Council). The resultant comprehensive database of arts organisations is included at Annex 1, and assuming that this is accurate would appear to show that published data sources appear to significantly underestimate the scale of the arts cluster that has developed in the district.

This analysis is summarised in table 6.12 and using the average regional GVA value per job of £35,526 shows that the Lancaster arts cluster may contribute annually upwards of £50m to the sub-regional economy. Note further, more detailed work with the database, perhaps sampling the list for employment numbers would be needed to substantiate more robustly this level of contribution.

Table 6.12: Overall value of Arts activity in Lancaster district

	Number of Businesses	Number of employees (Gross)	Average business size	Net additional jobs	GVA value per annum (£m) based on £35,526 per head
SIC (NOMIS data)	120	538 jobs	4.48 jobs	622	£22.1m
Yellow Pages (Experian)	103	355 jobs	3.44 jobs	410	£14.6m
Google search & local knowledge	602	1,200 - 2,100 jobs	Assume cautious range 2.0 - 3.5 jobs	1,390 – 2,430	£50m - £85m

Whatever a further survey might reveal, there needs to be more recognition of the role that the three main funders have played in investing in the arts in Lancaster district over 30 years. This investment has supported many arts providers over the years, which in turn has created a skilled and creative supplier base. It cannot be a coincidence that there are so many businesses and organisations in this sector in an economy of this size.

7 Key findings

Preamble

This study has looked in detail at the economic value of the 7 ACE funded RFO organisations that make up the core of the membership of the Lancaster Arts Partnership.

Given the current economic climate; increasing pressures on public finances and uncertainty over future funding, the report's focus has very much been on the monetised economic impact of the arts activities offered by the seven organisations, and the return on investment that each organisation as well as the Partnership delivers.

This focus on monetised economic value is not however to diminish, in any way, the wider social and cultural benefits that these organisations deliver - locally produced theatre; hundreds of outreach classes delivered annually with local schools; the self-confidence and self-esteem developed through the work of the Dukes DT3 theatre, More Music's music teaching and Ludus' dance. Together, it is estimated that the Partnership organisations work with more than 20,000 young people annually, inspiring interest and fulfilling aspirations in new skills across activity as varied as contemporary dance, theatre, digital media, creative writing and poetry listening.

The study has included a major programme of primary research with more than 1,200 people who have attended the partners' activities, with survey sampling undertaken from the Partners' booking data bases. Over 90% of people asked rated their experience of the LAP Partners a score of between 7 and 10 (10 = excellent), with an overall average of 8.3 and 87% 'agreeing' or 'agreeing strongly' that their experience was high quality. A third of people questioned took the view that they would not have been able to experience the activity offered by the Partners anywhere else in the North West.

This section now highlights the key findings from the economic study which has been the core of this report and the primary research work undertaken to accompany the economic study undertaken by Information by Design.

Key highlights from the Economic Study

- Funding support from Arts Council England is usually reflective of excellence in arts activity. Lancaster district receives the third highest level of ACE support in the North West region, behind Manchester and Liverpool;
- The activities of the 7 LAP Partners generate c.200 net additional jobs, and an annual economic contribution of £7.5m;
- The large majority of this economic contribution is captured within Lancaster district (c.80%); a further 5% in the rest of Lancashire; 7% throughout the rest of the North West region, and the remaining 8% outside the North West region;
- A further £800,000+ of marketing/promotion value is generated through media coverage of the activities of the Partners [this could be strengthened further with details from Litfest, and folly];
- The LAP Partners, whilst significant in their own right, are however just part of a much larger cluster of arts activity that has developed in Lancaster since the 1970s. The database compiled during the study suggests around 600 organisations supporting between 1,200 and 2,100 jobs, potentially contributing annually upwards of £50m to the sub-regional economy. This appears to offer a critical area for follow-up work with the economic development team at Lancaster City Council to promote further the benefits of this cluster.

- As a partnership, the LAP offers good value for money in terms of economic return on investment for the core funders of ACE, Lancashire County Council and Lancaster City Council, delivering £5.19 in economic benefit for every £1 of revenue investment. This compares well against tested benchmarks (for example PWC's 2009 findings - average GVA return for RDA business support projects of £2.80:1; and,

- The tri-partite funding arrangement of Arts Council England funding supported by contributions from Lancashire County Council and Lancaster City Council is fundamental to the on-going operations of the 7 partners, (in the case of some of the partners, this arrangement has been in place for the last 30 years). There is real concern that any significant withdrawal or reduction in support by any one of the funders acting alone would seriously undermine the confidence/commitments of the other two funders.

Key highlights from the Primary Research surveys

- A total of 1,220 interviews collected from across the 7 LAP partners, and also including a 'mop-up' survey of 200 from attenders of Lancaster City Council's Platform and Dome venues (note Dome now closed);

- Typically the profile of the survey sampling was designed to align with the profiles of audience bookers. For the Dukes, Storey Gallery, and Litfest the audience profile is similar, drawing 60% from Lancaster district; 15%-20% from the rest of Lancashire; 10%-15% from the rest of the Northwest and 8%-10% from outside the North West.

- Live at LICA and its audiences for the Nuffield Theatre and Concert Series draw c.55% locally, 14%-18% from the rest of Lancashire and around 30% from the rest of the North West and outside the North West.

- Ludus and More Music appear to draw the majority of their audience from within the district in relation to their teaching classes and workshops. Clearly Ludus' touring dance company reaches a much more diverse audience nationally.

- folly however appears to have a very different demographic, drawing just c.22% of its audience from Lancaster, 16% from the rest of Lancashire and c.60% from the rest of the North West and from outside the region.

- for the Dukes, and indeed Lancaster, the summer performances in Williamson Park are a very important 'shop window'; this year's performances of Peter Pan drawing a total of 13,240 people, often as family groups - 39% from Lancaster district; 32% from the rest of Lancashire; 24% from the rest of the North West and 5% from outside the region.

- The survey results around reasons for visit show a very high correlation with the arts activity stated as the primary reason for the visit (perhaps not unexpected given the sampling was sourced from bookers databases). However, the results do appear to show that there is room for improvement around 'linked trips' – opportunities to encourage audiences to combine their arts activity with a shopping trip in the city or a bar or restaurant visit. There is evidence that this is occurring but the results are variable – between 2% and 15% of visits. Clearly, work to improve these levels (perhaps through promotional arrangements) would improve the economic contribution.

- Similarly, there appears room for improving the number of visits associated as part of a holiday or leisure day trip to maximise the economic potential of Lancaster's arts credentials as an important tourism driver for the area.

- In terms of image and perception and the links with quality of life, across all venues and events - more than 80% agreed or agreed strongly that the arts are '*a very important part of my quality of life*'; 71% thinking that the arts '*enhance the quality of life in Lancaster*' and just under 50% thinking that the range of arts activities in Lancaster differentiates it as a place to live.

Further opportunities to develop the economic value of the arts in Lancaster district

- Further work is needed to fully understand the scale, activity and economic contribution made by the 602 local businesses and organisations identified as actively involved in the arts across Lancaster District. Potentially, these provide a talent pool in Lancaster district which could better serve the wider sub-regional and regional economy if their work were to be actively promoted outside the area. Both the county and the district councils have a potentially important role here.

- Although the bookers' post codes show that some people could have been overnight stayers, it was somewhat disappointing that the audience survey work suggests that many of these tend to travel back home after the event, or those who do stay, tend to stay with friends and family. There was also not too much evidence of promotional activity between tourist / accommodation operators (some limited evidence of linked deals with restaurants) and arts providers, revealing that there is a significant opportunity for further economic benefit from the arts if these activities were better joined up, perhaps facilitated by the LAP Partners working with the City Council's tourism team. For example – a "*sell beds to bookers*" initiative.

- A further opportunity lies in the fact that arts providers in the district could be an important resource for the City Council's new initiative for more events and festivals. The arts partners have a reach beyond the immediate residential base which could be developed in partnership with the City Council.

- Tourism research from L&BTB has shown that Lancaster has a strong association with culture, but it is usually the heritage aspect of culture which is brought to mind. The "living" arts aspect of culture has a much lower profile and given this is the case, there is a significant opportunity to promote Lancaster district as a destination for all 3 aspects - heritage, arts and landscape. A further benefit of including the arts in Lancaster's culture offer is that arts activity is spread across the whole district.